

**T-Time Development Committee:
Report and Recommendations to
Town of Eastham Select Board**

November 2021

**Submitted by:
Town of Eastham T-Time Development Committee**

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I. COMMITTEE VISION STATEMENT

How can you design for the future while respecting the past? You look for the ways that development and redevelopment can combine the best of the Old Cape with bold out of the box thinking into something that is still patently Eastham. Respecting the past means more than honoring the local architecture, it means respecting the land and wildlife around us and finding ways to eliminate reliance on non-renewable energy, to protect groundwater, to minimize water use, and finding bold and creative ways to build something that creates positive and long-lasting impact for the people who live in this community.

The T-Time Development Committee recommends forward thinking mixed-use development across the T-Time and Town Center properties that prioritizes environmental stewardship while creating opportunities for community building within and across the generations; increasing access to recreational activities for all; increasing access to attainable year-round rental housing; and supporting existing businesses while also providing opportunities to grow new ones. We envision development that will meet current needs yet be flexible and adaptable as community needs evolve over time.

The Committee sees the T-Time site as a community-oriented, multigenerational walkable neighborhood with plenty of green and natural space for gathering, events, and recreation, and year-round attainable rental housing. A public Community Center anchored by the Recreation Department and the Council on Aging, and an option for a 50-meter pool, would provide programming for all ages and that would be affordable across income levels. Artist/artisan shacks and pop-up entrepreneurial space would provide opportunities for locals and help make this a destination for all.

Town Center Plaza would remain a commercial site, redeveloped as its own walkable neighborhood with year-round attainable housing on top of restaurants and retail businesses. There would be a balance between structures and green/natural space for gathering, along with options for dining outdoors, and entrepreneurial space to help locals get started.

Developed together, T-Time and Town Plaza would create two vibrant neighborhoods that will be a start to a walkable North Eastham, helping to meet the current needs of our Town, while looking to the future.

II. PROJECT OVERVIEW AND OBJECTIVES

The Town of Eastham purchased the T-Time Property in 2019 after the Stratford Development Company's proposals to build a housing complex on the site met with community opposition. The Zoning Board of Appeals denied the proposed project and then the developer appealed to the state Housing Court. The Town went into extended litigation and then began negotiations with the developer and Stop & Shop, who still owned the property at the time. The developer agreed to transfer purchase rights to the Town, and the purchase and sale agreement was approved by Town Meeting Voters in May of 2019.

In late 2019, the T-Time Development Committee was created by the Eastham Select Board to consider possible uses for the property that would benefit Town residents. The Committee is structured as an advisory body to the Select Board, and its official charge requires that it conduct an inclusive process that reflects the ideas and values of the entire community. The charge of the Eastham T-Time Committee is centered around strategic use of the T-Time property to satisfy unmet community needs. The official charge is outlined below.

Additionally, beginning in June 2021, the T-Time Committee was asked by the Town Administrator to amend its work process to collectively consider uses for the T-Time property and two other town-owned parcels: the to-be-acquired Town Center Plaza property (4550 State Highway) and the current Council on Aging property (1405 Nauset Rd). Thus, descriptions of these properties and recommendations for their future use are also included in this report along with recommendations for the T-Time property.

T-Time Development Committee Charge

Primary Goals:

The Committee will work to identify the highest and best use of the land and utilize the following criteria (in no particular order) to prioritize its recommendations:

- *Social/community value*
- *Business value (public/private partnerships)*
- *Adding vibrancy and aesthetic appeal*
- *Economic Development*
- *Infrastructure improvements (traffic, transportation, utilities, wastewater)*
- *Creativity*
- *Potential regional partnerships, and*
- *Consistency with the goals of the town's strategic plan: preserve natural resources, encourage and welcome a diversity of residents, improve the travel experience, foster community spirit, enhance access to public recreational resources and increase the diversity of housing options.*

Responsibilities:

The work of the Committee will be in two phases. Phase I will be primarily focused on a process of data gathering, research and analysis to identify and recommend possible options. Phase II will narrow the options and move toward a final recommended plan for the site.

The role of the committee is to:

- *Solicit, synthesize, and integrate current ideas and planning priorities (such as the new strategic plan data);*
- *Consider current zoning and potential future zoning;*
- *Generate new ideas through research and data gathering;*
- *Consider unmet needs of the community and prioritize;*
- *Study existing land use models from other communities;*
- *Along with town staff, develop recommendations (options) for the Select Board.*

III. SITE DESCRIPTIONS

T-Time Site - 4790 State Highway/Route 6 (10.86-acres)

This parcel is known as the T-Time property and was purchased by the Town in 2019 following a grassroots community petition to prevent it from being developed as a large apartment complex. It is one of very few large, vacant parcels remaining in Eastham and is located in the town's main business corridor. In its current state, the T-Time property is an open grassed parcel, formerly used as a driving range. The site is bounded on the north by a local garden center and landscaping business, to the south by a real estate office and the Willy's Gym facility, to the east by the Cape Cod Rail Trail, and to the west by State Highway Route 6. There is a 100-foot electrical easement along the east side of the property. The parcel has a restrictive covenant prohibiting the sale of food or food products for off-premises consumption, or any parking, utilities, or infrastructure to support such uses. Eastham's Groundwater Protection Overlay District covers the entirety of the site and regulations under this overlay district apply to all new construction, reconstruction, or expansion of existing buildings or uses. The property is located in the Eastham Corridor Special District (ECSD) and is zoned Limited Commercial.

Town Center Plaza Site - 4550 State Highway/Route 6 (3.54-acres)

(This property is under agreement for purchase, as approved by Town voters in 2021)

This parcel is known as the Town Center Plaza. The parcel houses a commercial strip development and two smaller commercial buildings. The site is bounded on the north by the Friendly Fisherman restaurant, to the east by the Brackett Landing residential development, to the south by Cumberland Farms and the Cape Cod 5 Cents Savings Bank, and to the west by State Highway Route 6. The parcel includes an easement at the south of the property for access from Brackett Road via a paved driveway between Cumberland

Farms and Cape Cod 5. Eastham's Groundwater Protection Overlay District covers the entirety of the site and regulations under this overlay district apply to all new construction, reconstruction, or expansion of existing buildings or uses. The property is located in the ECSD and is zoned Core Commercial.

Council on Aging Site - 1405 Nauset Rd (1.99-acres)

These parcels hold the Town's Council on Aging (COA) and an adjacent paved parking for the facility. No easements are recorded for the site and the property is zoned for Residential use. Should it be determined that the needs of Eastham's senior community can be better met through a relocation of the current Senior Center, use of the current COA property should be considered in tandem with the two other parcels described above.

IV. COMMITTEE WORK TIMELINE

Committee Meetings (December 2019 – November 2021)

Committee meetings were held at least monthly, for a total of 31 meetings. Each meeting began with an opportunity for public comment, followed by committee discussion and business agenda items.

Review of Town and Regional Documents (December 2019 – November 2021)

Committee members and Town staff undertook a comprehensive review of existing regional and Town-wide plans related to the community needs and planning priorities for Eastham and the Outer Cape. **Specific documents and reports used as reference materials include:**

- Eastham 2020-2024 Strategic Plan
- Eastham Market Study (2021)
- Eastham Housing Production Plan (2016, 2021)
- Town of Eastham Zoning Bylaws (2021)
- Cape Cod Commission Regional Policy Plan (2021)
- Eastham Recreation Commission "Rec Without Walls" Proposal (2020)
- Council on Aging Facility Needs (2020)
- Cape Cod Commission Resiliency by Design Report (2019)
- Urban Land Institute Technical Assistance Panel Report (2017)
- Eastham Town Recreation Survey (2017)
- Eastham Long Range Plan (2012)
- North Eastham Study (2007)

Findings from key Town documents were synthesized and compared side by side to identify alignments and themes. The resulting “Research and Key Findings Matrix” can be viewed as an addendum to this report.

Committee Work Groups (April 2020 – January 2021)

Work groups were established in the areas of Community Development, Economic Development, and Infrastructure to explore needs and options for use of the site in more detail. Work groups met for a total of 28 meetings, and invited 30 community groups and subject matter experts to speak on topics ranging from housing and community center operations to collaborative workspaces and trades industry needs.

Release of Public Status Report (January 2021)

The T-Time Committee released an interim status report to the public sharing findings from research and information gathering to date. The release of the Public Status Report marked the start of a substantial community engagement period, with the goal of obtaining public feedback on additional needs or uses to consider for T-Time, and in what priority.

Community Input Survey and Other Input Opportunities (March – May 2021)

Following the release of the Public Status Report in January, the T-Time Committee invited community input on the future of T-Time through: a community input survey; via email to a dedicated T-Time Committee email address (ttimecommittee@eastham-ma.gov); on the T-Time Committee Facebook page; and during a standing public comment period at each regular committee meeting. During July and August, the committee compiled information from this initial input period and, along with the reference documents outlined above, used it to refine a list of possible uses and guidelines for development of the T-Time property.

Addition of Town Center Plaza and COA properties into Committee Process (May 2021)

Weeks before the 2021 Town Meeting, the Town of Eastham was approached with the opportunity to purchase the 3.5-acre commercial property at 4550 State Highway known as Town Center Plaza. Following a three-quarter majority vote at Town Meeting, the Town entered into a purchase and sale agreement for the property. T-Time Committee members were then asked to amend their process to examine potential uses of the T-Time and Town Center properties collectively, considering whether certain community needs or unmet market demand identified through the T-Time research and planning process could be sited on the Town Center Plaza property. Together with T-Time, the Town Center Plaza property presents a unique opportunity for the Town to make progress toward Eastham’s Strategic Plan goal of a walkable, mixed-use village center in North Eastham, and ensure the highest and best use of each parcel.

In late summer 2021, it became clear that the T-Time Committee was ready to include a public community center building in its set of recommendations for use of the T-Time property. The committee was then asked by the Town Administrator to consider how the current Council on Aging (COA) property and building could be repurposed, should the COA move its programming and operations to a new public building on the T-Time property.

Draft Recommendations and Additional Public Input (August – November 2021)

Results from the committee's thorough research and fact-finding process, beginning in January 2020, and from the initial community input received in January-June formed the basis of a set of draft recommendations, released to the public in August 2021. Following the release of the draft recommendations, the committee launched a second extensive public input process. Between the months of August and November, members of the public were invited to share their reactions and feedback on the committee's draft recommendations through a series of three remote and in-person public forums; an online "Quick Reaction Poll;" three targeted focus groups for residents aged 40-and-Under; via email to the dedicated T-Time Committee email address; on the T-Time Committee Facebook page; and during the standing public comment period at each regular committee meeting. A summary of outputs and key findings from all community engagement activities can be found in the following sections of this report.

V. COMMUNITY ENGAGEMENT ACTIVITIES

The T-Time Committee's community engagement efforts have been substantial and are unprecedented in recent Town history. Community engagement from December 2019 through November 2021 included the following:

- **51 Public** Committee and Work Group Meetings
- **8 Additional Non-Public** Work Group Meetings
- **30 community groups and subject matter experts** engaged through Work Group Meetings
- **2,707 unique visits** to the Eastham T-Time Committee Website
- **22 emails received** via the Eastham T-Time Committee Email Address
- **335 followers** of the Eastham T-Time Committee Facebook Page
- **Reach of 12,174** through Facebook posts and events via T-Time Committee Facebook Page
- **2,200 responses** to the T-Time Community Input Survey (March-May 2021)
- **207 responses** to the "Quick Reaction Poll" designed to gauge community response to the committee's draft recommendations (August-October 2021)

- **148 attendees** and **30 public comments received** via the Public Forum Series, with two virtual forums and one in-person forum hosted (September-October 2021)
- **11 participants** in the 40-and-Under Focus Groups, developed to gather more targeted input from residents 40 years of age and under, who were underrepresented through other community engagement efforts.

VI. KEY FINDINGS

This section aims to synthesize and summarize key findings from the T-Time Committee's research and community engagement efforts during the entirety of Phase I (December 2019-November 2021). Information is organized categorically by source and topic. Public preference and group input are comprised of a combination of feedback received from all outreach and engagement activities, including the Community Input Survey (Mar-May 2021), Public Forum Series (Sept-Oct 2021), Quick Response Poll (Aug-Oct 2021), 40-and-Under Focus Groups (Oct 2021), emails to the committee, and committee public comment periods.

General Public Input

Community Center/Recreation

- Public recreation (indoor and outdoor) was the most highly favored use for T-Time, across all community engagement efforts
- 64% of Community Input Survey respondents said it was important to have a Public Community Center specifically on the T-Time property
- 72% of Community Input Survey respondents said outdoor gathering and recreation space was important to have on T-Time
- Public feedback throughout Phase I favored recreation options that meet the needs of "all ages"
- "Underserved" state of our community's youth was a recurring theme across public input
- Need for a 50-meter pool to support swim lessons, competitions, lap swimming, rehab, exercise programs, and other recreational activities was a recurring theme in the Community Input Survey, 40-and-Under Focus Groups, and via individual emails

Housing

- Responses on housing were mixed for T-Time, with 43% of Community Input Survey respondents saying it was "not important" for the site and 39% saying it was important
- Rental housing above commercial space was highly favored for Town Center Plaza across all input opportunities
- Housing was also strongly preferred for the COA property
- 57% of Community Input Survey respondents preferred year-round housing at prices that are attainable to Eastham's local workforce

- 53% of Community Input Survey respondents preferred housing options appropriate for meeting the needs of Eastham's seniors and elder population
- Across all input, there was a recurring preference for housing that "benefits all" and supports those living and working in Eastham

Economic/Business

- There was a strong desire to keep Town Center Plaza economic/business focused
- The need to focus on year-round businesses and jobs was a theme
- There was a frequently expressed need for pharmacy and medical services for all ages, particularly pediatric and general care providers
- Interest in flexible, pop-up, and start-up business spaces
- Community members 40-years and under were interested in coworking and collaborative workspaces

Mixed-Use Village Center

- Desire for a walkable town center was common across all input opportunities, and preferred for both T-Time and Town Center Plaza
- Preference for a mix of uses was also a theme for T-Time and Town Center Plaza
- Desire to incorporate park/open space with development on all three sites
- Community members 40-years and under wanted to see more "car-free" spaces

Concerns and Considerations

- Be mindful of tax impacts with any uses
- Do not duplicate existing services – make whatever is done unique and distinct to Eastham
- Consider traffic flow in and out of sites
- Consider impacts on surrounding properties

Advocacy Group Comments

Housing

- Amend the list of recommended uses for T-Time and Town Center Plaza to include "affordable housing"
- Avoid requiring specifics on income range, number of units, and density to make projects more appealing to developers and leave developers more room for flexibility in project design
- Do not isolate seniors away from amenities and transit at the COA property
- There is a serious need for studio, 1-bedroom, and 2-bedroom units
- If housing is not addressed, none of the other recommendations matter

Specific Need Group Input

Eastham Recreation Commission

- The Recreation Department currently uses a variety of town and private facilities and is beholden to each facility's availability, schedule, and fees.
- To meet programming needs, these facilities are often used in ways they were not designed to be used (i.e., a dining room as a gymnasium).
- Nauset Regional High School Facilities are in constant use for the school's athletic and other programs, and currently do not have sufficient space for even these programs.
- Transportation is required to use a mix of facilities, and beyond the Recreation Department's current 16-participant transportation capacity, expensive bus rental is required. Multiple program locations complicate pick-up procedures for parents and caregivers.
- A community center space would house all indoor programs under one roof, increase program options, expand size and age of participant groups, and eliminate costly fees and coordination. Programs could also be run in any weather conditions.

Eastham Council on Aging (COA)

- Small multi-purpose rooms are needed to accommodate programs, craft/arts activities, social groups, counseling, and other options.
- Outdoor programming space is needed for gardening and recreation.
- Improved "flow" of current space is needed to adequately accommodate staff, patrons, and volunteers.
- Eastham's in-progress Americans with Disabilities (ADA) Self-Evaluation & Transition Plan (SETP) included an audit of architectural conditions at nine town buildings. The audit found that the current COA requires an estimated \$114,000 in improvements to stairways and railings, bathrooms, and other areas to ensure equitable access for all. This was the highest estimated cost for any of the buildings audited in Eastham.
- The Eastham COA has started a Strategic Planning and facility needs assessment process, which is due to be completed in 2022 and will offer more thorough information.

Residents Age 40-and-Under

- There is significant unmet need for children/youth and families, specifically in the areas of indoor recreation opportunities, childcare, and medical
- Support for local public pool
- Desire for walkable, "car free" spaces was a theme among this group
- More spaces needed for "running into" each other, community-building
- Eastham should position itself as a pacesetter in sustainable development and renewable energy use
- A balance between natural and built environments should be reinforced as part of Eastham's community identity

- Housing support and rentals are needed specifically for working young adults and families earning too much to qualify for traditional assistance.
- Affordable commercial spaces are needed for young business owners and entrepreneurs just starting out

Nauset Regional High School Swim Team

- Community would benefit enormously from a 50-meter pool.
- The NRHS swim team struggles on an ongoing basis with facilities that do not provide the appropriate conditions for team practices.
- “The pool at Willy's gym is close to the school; however, it is falling apart and almost daily we faced issues that affected practices and meets.”
- A pool on the Lower Cape would offer jobs to students in lifeguard safety, "but also help to ensure that our young children are learning safety and improving their abilities to swim.”

Eastham Market Study

Eastham's first-ever market study was completed in April 2021 with special consideration given to economic opportunities for the T-Time property and North Eastham commercial area. A market study considers both quantitative and qualitative factors to present a snapshot in time for economic conditions, market potential, and unmet demand for a particular geographic area.

Eastham's market study included findings that were useful in helping the T-Time Committee narrow possible economic and business uses for the properties under consideration, and in identifying areas where unmet demand aligns with activity that could be supported on the sites:

- T-Time's frontage along Route 6, adjacency to the bike path, and size of the site present an opportunity for a mix of uses that meet both commercial and community needs, consistent with the Town's established vision for Route 6 corridor improvements and the creation of a village center. (*Eastham Market Study, pg. 57*)
- Eastham has many self-employed and home-based businesses, which tend to be higher-paying and highly skilled occupations. Accommodations such as co-working space, commercial storage, and high-speed internet could better meet the needs of these operations. (*Eastham Market Study, pgs. 2, 56*)
- Eastham is functioning as a destination for dining and outdoor recreation. Amenities that support and expand Eastham's identity as a hub for these activities could encourage development and business growth, for example a commissary kitchen or designated food truck space. (*Eastham Market Study, pgs. 1, 25, 42*)

- The majority of retail demand is being met locally or via neighboring towns; however, there is a lack of quality retail oriented to full-time and seasonal residents. (*Eastham Market Study*, pgs. 2, 41)
- Existing “retailers would be more likely to thrive in a walkable town center area, and with events and public realm improvements that highlight their visibility.” (*Eastham Market Study*, pg. 2).
- Eastham’s commercial vacancy rate is next to nonexistent, and there is evidence to support unmet demand for retail, office, and light industrial space. (*Eastham Market Study*, pgs. 2, 19, 35, 40, 55, and 56).
- Insufficient wastewater infrastructure continues to be one of the biggest hindrances to development, redevelopment, and business growth in Eastham.
- Workforce is a constraint for industries across the board, and the high cost of living particularly for housing and childcare is a major barrier to attracting employees. A shortage of labor and workforce housing could potentially drive businesses out of Eastham or off-Cape. Increasing the supply of workforce housing is a high priority (*Eastham Market Study*, pgs. 2, 4, 43, 56)

Eastham Housing Production Plan

The Housing Production Plan for Eastham was updated in 2021, and the T-Time Committee referenced data and recommendations from the plan regarding the town’s most critical housing needs. This evidence-based information was considered alongside community input and preference data to help the committee arrive at its housing recommendations for T-Time, Town Center Plaza, and the COA property.

Key elements of the Housing Production Plan considered by the T-Time Committee include, but were not limited to:

- The ability to retain and attract new residents, particularly young families, remains a priority issue for the Town in the years ahead (*Housing Production Plan*, pg. 3).
- Census estimates suggest that Eastham lost 201 rental units between 2000 and 2019 (*Housing Production Plan*, pg. 6).
- For this same period of 2000 to 2019, Census estimates show an 8% increase in seasonal housing units and a 5% decrease in year-round units ((*Housing Production Plan*, pg. 4).
- 95% of Eastham’s housing units are single-family homes. (*Housing Production Plan*, pg. 6).
- While housing prices had already been increasing at a steady pace, COVID-19 caused a surge in housing demand that drained inventory and pushed prices to unprecedented levels. (*Housing Production Plan*, pg. 6).
- A wider range of affordable housing options is needed, including starter housing for younger households and families, as well as empty nesters looking to downsize (*Housing Production Plan*, pg. 8).

- The Town's resources for absorbing growth are limited given significant physical and infrastructure constraints (*Housing Production Plan, pg. 8*).
- Significant progress has been made in implementing the Housing Production Plan approved in 2016, with the development of 65 units of affordable rental housing through the Village at Nauset Green of particular importance. (*Housing Production Plan, pg. 10*).

Eastham 2020-24 Strategic Plan

The Town of Eastham's 5-Year Strategic Plan is an overarching road map for town initiatives and priorities between fiscal years 2020 to 2024. The plan outlines a set of goals and strategies to guide the Town's use of funds, staff, and other resources, as well as the efforts of boards, commissions, and committees. Eastham's Strategic Plan draws on input from the community, volunteers, and Town staff and synthesizes findings of the Town's recent planning efforts, which made it a go-to resource for the T-Time Committee throughout Phase I of their process.

Key elements of the Strategic Plan considered by the T-Time Committee include, but were not limited to:

- Goal 6: "Provide and enhance access to public recreational resources for all people."
- Strategy 1d: "Reduce municipal use of non-renewable energy sources and increase energy conservation measures..."
- Strategy 2a: "Make suitable land available for affordable housing."
- Strategy 3a: "Create a new community center for all ages through new construction or reuse of existing facilities."
- Strategy 3c: "Expand recreational afterschool and other community-wide programs."

VII. T-TIME COMMITTEE USE RECOMMENDATIONS

T-Time Property

The T-Time Development Committee recommends that the T-Time property host a mix of uses, with an emphasis on indoor and outdoor recreation for all ages, housing, and a balance of built structures with ample green space for public gathering and both active and passive recreation use.

- Future development of T-Time should focus on a **public community center building to accommodate program and activity needs for residents of all ages**, with the Town Recreation Department and Council on Aging serving as the site anchors.
- The committee also recommends **further consideration of cost and feasibility options for a 50-meter public pool** to meet local needs for year-round swim lessons, the NRHS swim team, lap swimming, general recreation, and rehabilitation services.

- Use of the site should include housing with an **emphasis on housing options that meet the needs of individuals earning 80-150% of area median income (AMI)**, and **additional housing consistent with goals outlined in Eastham's Housing Production Plan (2021)**.
- The site should include some form of **pop-up or start-up entrepreneur space, an area for food trucks, or other flex commercial space** in acknowledgement of the lack of affordable commercial brick-and-mortar space in Eastham and surrounding towns.
- The site use and design should reinforce the feel of a **walkable downtown area**, with car-free spaces, and should **retain public access to and from the Cape Cod Rail Trail** at the east of the property.

Town Center Plaza

Similar to the T-Time property, the T-Time Committee recommends that the Town Center Plaza property include a mix of uses, with a balance of built structures and green space. The committee recommends, however, that use of the Town Center Plaza property primarily emphasize commercial uses, with retention of the current businesses as the core of any future plans.

- The committee is in full support of the Town's commitment to **retain the six current businesses on the Town Center Plaza site** through any redevelopment activity and recommends that these businesses serve as the foundation of any plans for the site.
- **Additional retail, restaurant, and entrepreneurial space** is also recommended, with a focus on commercial activity that creates year-round jobs and service opportunities.
- The committee is also recommending **top-of-shop style housing** for the Town Center Plaza site, with housing units built on top of commercial space. Housing should **emphasize options that meet the needs of individuals earning 80-150% of AMI**, and **additional housing consistent with goals outlined in Eastham's Housing Production Plan (2021)**.
- Like the T-Time property, development of the Town Center Plaza site should create the **feel of a walkable downtown area**.
- Additionally, the committee is recommending plans include **outdoor dining spaces, improvements to the existing public transit stop at the site, and safe access for pedestrians and bicyclists on and around the property**.

Council on Aging

Should the current COA property become available through the Senior Center's relocation to a new shared recreation space at T-Time, the committee recommends this site be used for housing/residential development. The COA has begun its own strategic planning process, which will result in recommendations for future programmatic and facility needs; this process is expected to be complete in 2022.

- Use of the COA site should include **housing consistent with goals outlined in the Town's Housing Production Plan (2021)**.
- To ensure adequate access to transportation for future and existing residents, **it is also recommended that a public transit stop be added on or very near the site**, in coordination with the Cape Cod Regional Transit Authority (CCRTA).
- In acknowledgement of the rich community history of Eastham's Senior Center, special attention should be given to engaging those who helped build the current Senior Center, and **any future use should give special consideration to efforts that memorialize and honor key COA supporters and leaders**.

VIII. GUIDING PRINCIPLES FOR DEVELOPMENT

The T-Time Committee developed the following guiding principles based on established local and regional planning goals and the extensive public input received over the last two years. The principles reflect key themes and majority views that should be taken into consideration as the development process proceeds; however, it should be noted that they are not intended to be prescriptive or to constrain future development and construction phases.

Guiding Principles for All Three Properties

- The final product of any site use, whether built or natural, should be **aesthetically pleasing and consistent with the “look and feel” of Eastham**. This means that any development should reinforce traditional, village-style design and architectural elements unique to Cape Cod, while remaining in balance with the historically “underdeveloped” character of the town.
- Design must provide for **adequate infrastructure - and consider the impact of this infrastructure on the community and surrounding properties - for transit/transportation, wastewater, broadband, and other utilities** to support the site activities recommended in this report.
- All properties should be developed or redeveloped with a priority focus on environmental stewardship, including **minimizing the use of non-renewable energy sources, with a strong preference for eliminating their use entirely; limiting the amount of newly disturbed land and impervious surfaces; and avoiding adverse impacts to critical natural resources**.
- **Site design should strive for a balance between built and green/natural spaces**, clustering structures on the site where possible, preserving natural buffers to surrounding properties, and allowing ample space for outdoor community gathering places.
- Use of the sites should reinforce Eastham's commitment to **improve quality of life for a diversity of residents**, including families, youth, and elders.

T-Time Property

- Incorporate **mixed-use development** to increase opportunities for a diversity of services, recreation, civic spaces, housing, and job opportunities that support a vibrant village center.
- Create a **walkable, village-style area** with infrastructure and amenities for pedestrians and cyclists.
- Site design should **consider shared access with neighboring properties**, including the Cape Cod Rail Trail which abuts the property to the east.
- Buildings and outdoor space should account for **flexible or multiple uses wherever possible**.

Town Center Plaza

- Incorporate **mixed-use development** to increase opportunities for a diversity of services, shops, housing, and job opportunities that support a vibrant village center.
- Create a **walkable, village-style area** with infrastructure and amenities for pedestrians and cyclists.
- Site design should **consider shared access with neighboring properties**, including residential and commercial spaces.

Council on Aging

- Recommendations for the Council on Aging site are outlined in the “uses” section above, and in the guideline principles for all three sites.

IX. NEXT STEPS

Should the Eastham Select Board accept the recommendations in this report, the T-Time Committee recommends the following next steps:

- Publish the T-Time Committee’s Recommendation Report on the Town website and disseminate the report to local media along with a press release announcing the conclusion of this project phase.
- Proceed with Phase II activities outlined in the T-Time Committee’s charge via the “North Eastham Town Center Master Plan” project, which is anticipated to begin in January 2022.

X. ATTACHMENTS

- T-Time Development Committee Status Report (Jan 2021)
- T-Time Research and Key Findings Matrix (July 2021)
- T-Time Community Input Survey Results (June 2021)
- Summary of Public Input on Draft Recommendations (August-October 2021)
- Eastham Market Study (2021)
- Eastham Housing Production Plan - Executive Summary (2021)
- Eastham 2020-24 Strategic Plan - Executive Summary

Attachment 1:
**T-Time Committee
Status Report**



T-Time Development Committee

Status Report and Request for Public Input

To: All Members of the Eastham Community
From: The T-Time Development Committee
Re: Committee Status Report and Request for Public Input

OVERVIEW

The T-Time Development Committee, in collaboration with Town of Eastham staff, has been charged by the Select Board to identify the highest and best use of the Town-owned “T-Time Property,” an 11-acre parcel of land located at 4790 State Highway (Route 6).

The Committee began its work in late 2019, with eleven Committee members, each appointed for a two-year term. The work of the Committee was outlined in two phases: Phase 1 (in progress) is focused on data gathering, research, analysis of possible uses and best practices; obtaining community input to narrow down and prioritize uses; and presentation of recommended use(s) for approval by the Eastham Select Board. In Phase 2, working with Town staff and consultants, the Committee will use the preferred use(s) for the site to further engage the public and develop a “Master Plan” design for T-Time, complete with feasibility, funding, and other requirements for implementation. Both Phase 1 and Phase 2 have multiple goals to complete, and public input is key throughout the entire planning process. The Select Board is looking to the Committee to conduct an inclusive process that reflects and assimilates the ideas and values of the entire community.

As of January 2021, the T-Time Development Committee has completed a substantial amount of exploratory and fact-finding work to identify broad community, business, and other needs in Eastham, as outlined under the Phase 1 goals. No decisions or recommendations have yet been made by the Committee regarding use(s) for the site. ***The focus from this point forward will be to obtain public input on the research and information compiled to date, request feedback on what additional needs or uses the Committee should consider, and ask for the public’s help in prioritizing possible uses for eventual recommendation to the Select Board.*** These critical next steps will take place through a comprehensive public outreach campaign, and individual residents and members of the public will be invited to share their input and reactions in a variety of ways.

The T-Time Development Committee recognizes the significant opportunity the T-Time property presents for community members to help shape the future economic and community landscape of Eastham. The Committee takes seriously its role to include as many community members as possible in the planning process and is eager to hear from fellow residents about their ideas and vision for the site. Members of the public are invited to contribute their thoughts by **email, via the T-Time Public Input Survey, and through public comment at regular T-Time Development Committee meetings**, which are open to the public via Zoom.

For more information on how to submit your input, see Page 3 of this report.

SUMMARY OF WORK COMPLETED IN PHASE 1

This section gives a summary of work completed by the Committee to date, to prepare for public engagement.

Evaluation of Local and Regional Planning Priorities

Committee members and Town staff undertook a comprehensive review of existing regional and Town-wide plans related to the community needs and planning priorities for Eastham and the Outer Cape. The documents and data reviewed included: Eastham's 5-Year Strategic Plan (2020-24), the 2012 Eastham Long Range Plan, the 2007 North Eastham Study, a Technical Assistance Program Report created for the Town by the Urban Land Institute in 2017, the Eastham Town Recreation Survey from 2017, and the Cape Cod Commission's regional planning documents such as the Resiliency by Design Report (2019), among others. Key findings and recommendations from each plan or survey were synthesized and compared side by side to identify alignments and themes (see Addendum #3).

Consider Current Zoning and Potential Future Zoning

The Committee has reviewed existing zoning for the T-Time site and will evaluate zoning needs for the project once possible uses have been narrowed down and prioritized through the upcoming public input process.

Research and Data Gathering/Study Land Use Models from Other Communities

The Committee and Town staff reviewed a variety of comparable projects from other municipalities and regionally. The group explored existing public and private projects such as Mashpee Commons, the Harwich Community Center, the Martha Vineyard Island Housing Trust Projects, Housing Assistance Corporation projects, and Community Centers in Chatham, Wayland, Randolph, Hyannis, and Lincoln, Massachusetts to assess current community demand and best practices for a variety of services and uses.

Consider Unmet Needs of the Community

To date, the Committee has conducted a review of existing plans and survey data collected by a large swath of community groups and leading industries on the Cape. These sources cover regional and local needs for uses such as housing, recreation, business development, healthcare, childcare, education, the arts, and more. Additionally, the Committee engaged 30 local stakeholder groups and subject matter experts (see Addendum #2) to begin building a framework of needs and possible uses. Conversations with local groups are ongoing, and all are encouraged to reach out to share their input (see instructions for public input, page 3). The Town has also begun work on a market study to determine unmet business needs in Eastham and surrounding communities.

Next Step – Public Input and Prioritization of Needs

Recommendations or options for the use of the T-Time property will be presented by the Committee to the Select Board at the conclusion of Phase 1, which is still ongoing. Now that the Committee has completed its initial fact-finding and research, Phase 1 will continue with a larger public outreach effort designed to engage as many individuals as possible, upholding the Committee's charge to "reflect and assimilate the ideas and values of the entire community." Community members will be invited to share their reactions to the baseline information presented in this Status Report, suggest additional needs, or uses, the Committee should consider, and prioritize desired uses to identify the best fit(s) for the site and community. Community outreach will be carried out in a variety of formats to ensure that a diversity of viewpoints is heard.

BASELINE INFORMATION FOR PUBLIC INPUT

This section of the report presents information collected and analyzed by the Committee to date, with the intent of inviting the public to review and then provide feedback. Information is organized in the following categories: *Housing, Community Recreation/Community Space, Business & Economic Development, Infrastructure and Other Needs and Priorities*. Public input on this information will guide the Committee's continued fact-finding and research work and help Committee members begin to formulate and prioritize recommendations to the Select Board on the best use for the T-Time property.

TO SEND THE COMMITTEE YOUR INPUT:

- **Email:** timecommittee@eastham-ma.gov;
- **Complete the online Community Input Survey** at www.easthamtime.org (hard copy available upon request);
- **Call** the dedicated T-Time Public Input line to leave a voice message: **774-801-3803**;
- **Speak during the public comment section** of a regular T-Time Committee meeting. Visit the Town website at www.eastham-ma.gov for upcoming meeting dates. *Note:* public comment takes place at the beginning of each meeting. Scheduling of comments is recommended but not required. Email timecommittee@eastham-ma.gov;
- **Request time to meet with the Committee.** Email timecommittee@eastham-ma.gov to schedule a time.

HOUSING

The T-Time Development Committee appointed a “Community Development Work Group” to complete background research and fact-finding work on a variety of possible community-oriented uses for T-Time, including housing. The need for new housing and increased diversity of housing options is a recurring theme for Eastham, and regularly emphasized in both regional and Town-wide planning documents such as Eastham's 5-Year Strategic Plan (“Goal 5: Increase diversity of housing options”). There is broad agreement among local housing advocates and other subject matter experts consulted by the Committee to date that Eastham - and the Cape in general - are in most need of **1- or 2-bedroom market rate rentals and attainably priced single-family housing**. The most pronounced need is for housing types suitable for young families, workforce, and downsizing seniors. Other baseline information and best practices compiled through the Committee's preliminary research include:

- A **“mixed use” approach, pairing housing with other uses** (community, business, recreation) can help create a neighborhood feel and increase access to needed goods and services for neighboring residents;
- A **combination of housing types on one site**, for example, higher-density single family housing “tucked behind a commercial streetscape,” plus rental units “top-of-shop” on commercial space, could provide more housing units without disrupting the look or feel of surrounding properties;
- **Innovative funding mechanisms**, such as those that pair sustainable housing development practices with “buy down” options, community trusts, or other programs that can bridge the gap between area median income rates and disproportionately high market housing costs;
- An **emphasis on complementary, compatible development** and a good “fit” with surrounding commercial and residential properties can help maintain Eastham's unique identity;
- **Modular building** can help defer construction costs while also traditional housing design styles.

COMMUNITY RECREATION AND PUBLIC SPACES

The Community Development Work Group of the T-Time Committee also examined a variety of possible community-oriented uses for the T-Time site. Eastham's 5-Year Strategic Plan clearly outlines the goal of creating a community center for all ages. Such a space could serve as a community hub where residents could meet and interact, or utilize large, open, multi-purpose space for a variety of programs and events. A community center space would replace existing Town facilities that are in poor condition and/or do not meet local demand for services, providing a centralized, physical "home" for Eastham Recreation Department and Council on Aging (COA) activities, among others. Neighboring towns such as Orleans are also lacking a community recreation space, providing opportunity for regional collaboration. Specific gap needs like an indoor community pool, indoor basketball courts, outdoor space for a farmers' market or community events, and small meeting room space were also reviewed by the work group. The group has researched and evaluated a variety of needs and possible uses to date, including:

- **Large multi-function/multi-purpose space** for various activities, configured to different sizes with an accordion divider. Currently, the largest private event space in Eastham accommodates 300 people (Sheraton ballroom); the largest Town space accommodates 120 (Eastham Library).
- **Small meeting space** – The Library reported that spaces are regularly full during normal operations.
- **A public, outdoor gathering space** – A number of local groups consulted to date noted the need for larger outdoor event space, and a flexible, open "town center" to provide a sense of community.
- **Indoor Olympic-sized pool** – Nauset Schools has noted an ongoing need for a pool and was not able to gain approval from the State to include one in the Nauset Regional High School renovation plans. It was noted multiple times that no "community pool" option currently exists; some residents pay for access through Ocean Edge, the Chatham Aquatics Center, or other entities located at least a 20-30-minute drive away. The Eastham Recreation Department Survey in 2017 also noted aquatics facilities as a need and something a majority of both full-time and seasonal residents would use.
- **Full-size, indoor basketball court** – While outdoor court space has been improved through the Town Hall "Field of Dreams" and outdoor court space, indoor basketball space in Eastham is limited to the Elementary School, which is not full size, and has no bleachers or safe space for spectators.
- **Weight room and cardio room** – The COA and Eastham Recreation have both found a need and desire for such facilities among residents. In speaking with the Harwich Community Center, their staff reported that the weight room is one of the most popular features of their facility, and one of the biggest revenue generators; they are outgrowing their space due to demand.
- **Four-season tennis and pickleball courts** – The group found a local desire for courts that could be used year-round, either located indoors, or constructed in an indoor-outdoor flexible style.
- **Arts and music practice space, exhibition space, and studio space** - Visual arts and dance classes do not currently have a good space for instruction and practice for artists/performers of all ages. Professional artists constitute about 4% of the registered businesses in Eastham alone, but most operate out of their homes due to a lack of studio space in the area. Provincetown Commons, a collaborative workspace in Provincetown, offers artist studio rentals which are very popular.
- **Community TV facilities and studio space** – Lower Cape TV is developing a "Strategic Facility Plan" with a nonprofit consultant and a commercial real estate advisor. They are looking for a highly visible and highly accessible location, 4000-7000 sq ft.
- **Community kitchen space** – A commercial kitchen space could support commissary and business development (scale-up) needs for local food businesses. The COA, Lower Cape TV, and other local

groups consulted to date expressed interest in a kitchen space suitable for events, televised cooking shows, and/or cooking classes for all ages.

- **Community garden space** – This was discussed as a possibility for meeting interests and needs for intergenerational programming or outdoor recreation space.

BUSINESS & ECONOMIC DEVELOPMENT

The T-Time Development Committee reviewed a variety of economic priorities and needs for both Eastham and the Cape Cod region as a whole via an “Economic Development Work Group” of the Committee. The group reviewed possible business uses for T-Time against the framework of Community Priorities outlined in Eastham’s 5-Year Strategic Plan – strengthening Eastham’s year-round economy, increasing employment opportunities for residents, expanding economic opportunity, and reinforcing Eastham’s community identity. Market changes such as the increase in remote work nationwide, and the decline of traditional brick-and-mortar retail operations, were a focus of group discussions, as were needs for Eastham’s professional tradespeople, fishing community, and food-related businesses. Other research and possible uses reviewed to date include:

- **Co-working or collaborative workspace** – Rental workspaces that accommodate remote workers - with small meeting rooms, shared business equipment, and other such amenities - are increasingly needed as more work-from-anywhere business models emerge. The closest coworking spaces are located in Provincetown and Chatham, as well as a collaborative “maker” space in Orleans.
- **Commercial kitchen space** – See “community kitchen space” above.
- **Business incubator space** – With the cost of commercial real estate increasing, it was noted that small businesses could benefit from “pop-up” or incubator space to allow for short-term, low-cost market testing of business ideas. Smaller storefronts could also be used for artist or craftsman work/display spaces, as seen in downtown Hyannis. Spaces might be outdoor, indoor, or “open air” style.
- **Farmers’ Market space** – The work group spoke with a local group looking to start a Farmers’ Market in Eastham, which would require an outdoor, flexible event space.
- **Tradesmen Park** – There are limited areas in town where this sort of “light industrial” use is permitted. Building/construction and trades businesses comprise more than 20% of registered businesses in Eastham, which could support a need for increased workspace and/or storage options.

INFRASTRUCTURE

The T-Time Development Committee conducted an initial review of infrastructure needs for the T-Time site with assistance from an “Infrastructure Work Group” of the Committee. The group and Committee agreed that infrastructure needs will largely be determined by the use(s) of the site. Because specific uses will not be recommended by the Committee until the end of Phase 1 (still in progress), discussions were focused on broad concepts and general discussions of need and feasibility. The Committee acknowledged that T-Time could serve as a catalyst to meet infrastructure needs or goals for surrounding properties, such as residential and public high-speed Internet, and commercial wastewater.

- **Fiber/high-speed Internet** – The Committee discussed the idea of public-access Internet on the site, higher speed service to accommodate uses like coworking or media production, and the possibility of T-Time providing a middle-mile connection for surrounding properties.
- **Wastewater** – The group discussed that the T-Time site would require wastewater infrastructure to support whatever uses are decided upon but noted that the scale of the system would depend on the uses. Adjacent properties could “tie in” to improved wastewater infrastructure at T-Time, encouraging improvements in the North Eastham area that are compatible with Eastham’s 5-Year Strategic Plan.

- **Route 6** – The Committee reviewed options for traffic improvements along Route 6 to accommodate the T-Time site, including a potential roundabout. Town staff are working on a parallel effort with MassDOT to address traffic safety concerns, to be coordinated with the T-Time planning process.
- **Brackett Road Connection** – The Infrastructure Work Group held general discussions on a potential frontage access road connecting T-Time to Brackett Road. This concept will be investigated further as part of Eastham’s 5-Year Strategic Plan implementation, as well as through targeted outreach to business/property owners in this area.

OTHER NEEDS AND PRIORITIES

- **A Village Square/Town Center in Eastham** – Eastham’s 5-Year Strategic Plan and multiple stakeholder conversations observed the need for a defined Town Center or central business district in Eastham. The trajectory of Route 6 through the center of the area right in front of T-Time has been frequently cited as a barrier or challenge to this concept.
- **Aesthetics and Community Character** – There was agreement that the design must be aesthetically pleasing and compatible with local architecture/community character to uphold and reinforce the identity of Eastham.
- **A Mix of Uses** – A neighborhood feel with a combination of housing, community, and other uses has emerged as a desirable goal for the T-Time site and surrounding areas.

ADDENDUM #1

T-TIME DEVELOPMENT COMMITTEE CHARGE BY SELECT BOARD

The Town of Eastham Select Board established the T-Time Development Committee in August 2019 and provided the following charge: “The Committee will work with Town Staff to develop recommendations for the use of the former T-Time site (4790 State Highway) and identify any resources or partnerships that may assist the Town in best utilizing this parcel of land. Members shall prioritize the overall best interests of the Town of Eastham, regardless of their other affiliations or interests. The Select Board is looking to the committee to conduct an inclusive process that reflects and assimilates the ideas and values of the entire community. The Committee will work to identify the highest and best use of the land and utilize the following criteria (in no particular order) to prioritize its recommendations:

- Social/community value
- Business value (public/private partnerships)
- Adding vibrancy and aesthetic appeal
- Economic Development
- Infrastructure improvements (traffic, transportation, utilities, wastewater)
- Creativity
- Potential regional partnerships, and
- Consistency with the goals of Eastham’s 5-Year Strategic Plan: preserve natural resources; encourage and welcome a diversity of residents; improve the travel experience; foster community spirit; enhance access to public recreational resources; and increase the diversity of housing options.

The work of the Committee will be in two phases. Phase I will be primarily focused on a process of data gathering, research and analysis to identify and recommend possible options. Phase II will narrow the options and move towards a final recommended plan for the site. The role of the committee is to:

Phase I 2019-2020:

- Solicit, synthesize, and integrate current ideas and planning priorities (such as Eastham’s Strategic Plan data);
- Consider current zoning and potential future zoning;
- Generate new ideas through research and data gathering;
- Consider unmet needs of the community and prioritize;
- Study existing land use models from other communities and;
- Along with town staff, develop recommendations (options) for the Select Board.

Phase II 2020--2021:

Once preferred options are approved by the Select Board:

- Work with consultants and staff to explore detail of each option and assess feasibility;
- Identify potential funding and partners;
- Create a business plan and/or implementation plan (if applicable);
- Present plan to the Select Board.”

ADDENDUM #2

LIST OF STAKEHOLDERS & PHASE 1 PROGRESS CHART

GROUPS + SUBJECT MATTER EXPERTS CONSULTED FOR INITIAL RESEARCH

Bennett Environmental Associates	Housing Assistance Corporation
Brewster Farmers' Market	Martha Vineyard Island Housing Trust
Cape Associates	Lower Cape TV
CapeBuilt	Nauset Regional School District
Cape Cod Culinary Incubator	Orleans Recreation Advisory Committee
Community Development Partnership	Outer Cape Chorale
Eastham Chamber of Commerce	Pants Factory
Eastham Council on Aging	Provincetown Art Association & Museum
Eastham Affordable Housing Trust	Provincetown Commons
Eastham Painters Guild	Sustainable CAPE
Eastham Public Library	The 246 Community Kitchen
Eastham Recreation Commission / Recreation Department	The Coastal Companies
Entrepreneurship for All (EforAll) Cape Cod	The Principle Group/Mashpee Commons
Harwich Community Center	Truro Center for the Arts at Castle Hill
Harwich Cultural Center	Wild Care Cape Cod

SUMMARY CHART OF PHASE 1 PROGRESS

<i>PHASE 1 GOALS</i>	<i>PROGRESS</i>
Evaluation of Current Planning Documents and Priorities	<i>Complete</i>
Consider Current Zoning and Potential Future Zoning	<i>In progress</i>
Research and Data Gathering	<i>In progress</i>
Consider Unmet Needs of the Community	<i>In progress</i>
Study Existing Land Use Models from Other Communities	<i>In progress</i>
Conduct Comprehensive Public Outreach Process	<i>Beginning now</i>
Develop recommendations (options) for the Select Board	<i>Not started</i>

Attachment 2:

**T-Time Research and
Key Findings Matrix**

T-TIME RESEARCH AND KEY FINDINGS MATRIX

T-TIME COMMITTEE CHARGE CRITERIA	T-TIME COMMUNITY INPUT SURVEY 2021	EASTHAM MARKET STUDY 2021	5-YEAR STRATEGIC PLAN	HOUSING PRODUCTION PLAN 2021	URBAN LAND INSTITUTE REPORT 2017	LONG RANGE PLAN 2012	NORTH EASTHAM STUDY 2007
Vibrancy and aesthetic appeal	<ul style="list-style-type: none">• Preference for limited housing on T-Time that “looks like Cape Cod”	<ul style="list-style-type: none">• Retailers would be more likely to thrive in a walkable town center area, with events and public realm improvements that highlight their visibility• T-Time’s frontage on Route 6 could be developed for small retail shops with parking behind the buildings to enhance streetscape and increase visual continuity along Route 6	<ul style="list-style-type: none">• Implement a branding/signage program for Eastham• “Activate” public spaces and create a sense of identity by adding benches, lighting, permanent or temp public art• Adopt architectural design guidelines for new development along Route 6/North Eastham Village Center	<ul style="list-style-type: none">• Due to high housing costs, residents of all ages are finding it increasingly difficult to afford to live in town• Prepare design guidelines	<ul style="list-style-type: none">• A traditional village Town center was never established, leaving the Town with no real central gathering place• Insufficient signage/wayfinding and a lack of town identity	<ul style="list-style-type: none">• Encourage landowners to restore blighted or abandoned areas to open space.• Consider making town-owned land available for agriculture, open space	<ul style="list-style-type: none">• Organize the Village Common and open spaces around civic buildings• Potential relocation of the North Eastham Post Office• Village centers should be visually distinct from surrounding landscapes and create a sense of arrival as one approaches the center
Social/Community Value	<ul style="list-style-type: none">• Desire for a community gathering space – “a place for locals to gather”	<ul style="list-style-type: none">• With its size (11 acres) and adjacency to both Rail Trail and Route 6, T-Time property could accommodate a mix of commercial, residential, civic, and recreation uses	<ul style="list-style-type: none">• Host regular and widely advertised community events for a range of participants	<ul style="list-style-type: none">• Housing that incorporates services for disabled and senior residents	<ul style="list-style-type: none">• Eastham lacks gathering spaces necessary for building a strong sense of community	<ul style="list-style-type: none">• Provide spaces to serve a variety of age groups with a particular emphasis on young adults, homeschoolers and the physically/mentally challenged.	<ul style="list-style-type: none">• Village Center should be pedestrian-oriented and easily accessible• Should accommodate a variety of commercial, residential, and other uses
Business Value/Economic Development	<ul style="list-style-type: none">• Preference for local, small businesses• Startup or incubator spaces preferred• Goods/services for year-rounders are needed more than those serving visitors• Least preferred business use at T-Time site was trades/shellfishing storage or workspace	<ul style="list-style-type: none">• There is low commercial vacancy• A lack of available commercial space is frequent complaint from local businesses• Accommodations such as coworking space and commercial storage could better meet the needs of Eastham’s many self-employed and home-based business operations• Eastham is functioning as a destination for dining and outdoor recreation. Amenities that support and expand Eastham’s identity as a hub for these activities could encourage development and business growth (ex. commissary kitchen or food truck space)• There is a lack of quality retail oriented to full-time and seasonal residents	<ul style="list-style-type: none">• Provide support for “eco-businesses” (nature-based tourism, blue economy)• Partner with developers on housing development opportunities	<ul style="list-style-type: none">• Partner with developers on housing development opportunities• Pursue regional housing initiatives w/ Cape towns	<ul style="list-style-type: none">• Create Entrepreneurial Commercial Space• Establish zoning to create a “Tradesmen Park”• Support commercial bulkheads for fishing industry	<ul style="list-style-type: none">• Work with private sector, Chamber of Commerce identify/develop entrepreneurial/ business activities	<ul style="list-style-type: none">• T-Time Family Sports Center has excellent potential for mixed-use development, including limited commercial, workforce housing, and senior housing.

T-TIME RESEARCH AND KEY FINDINGS MATRIX

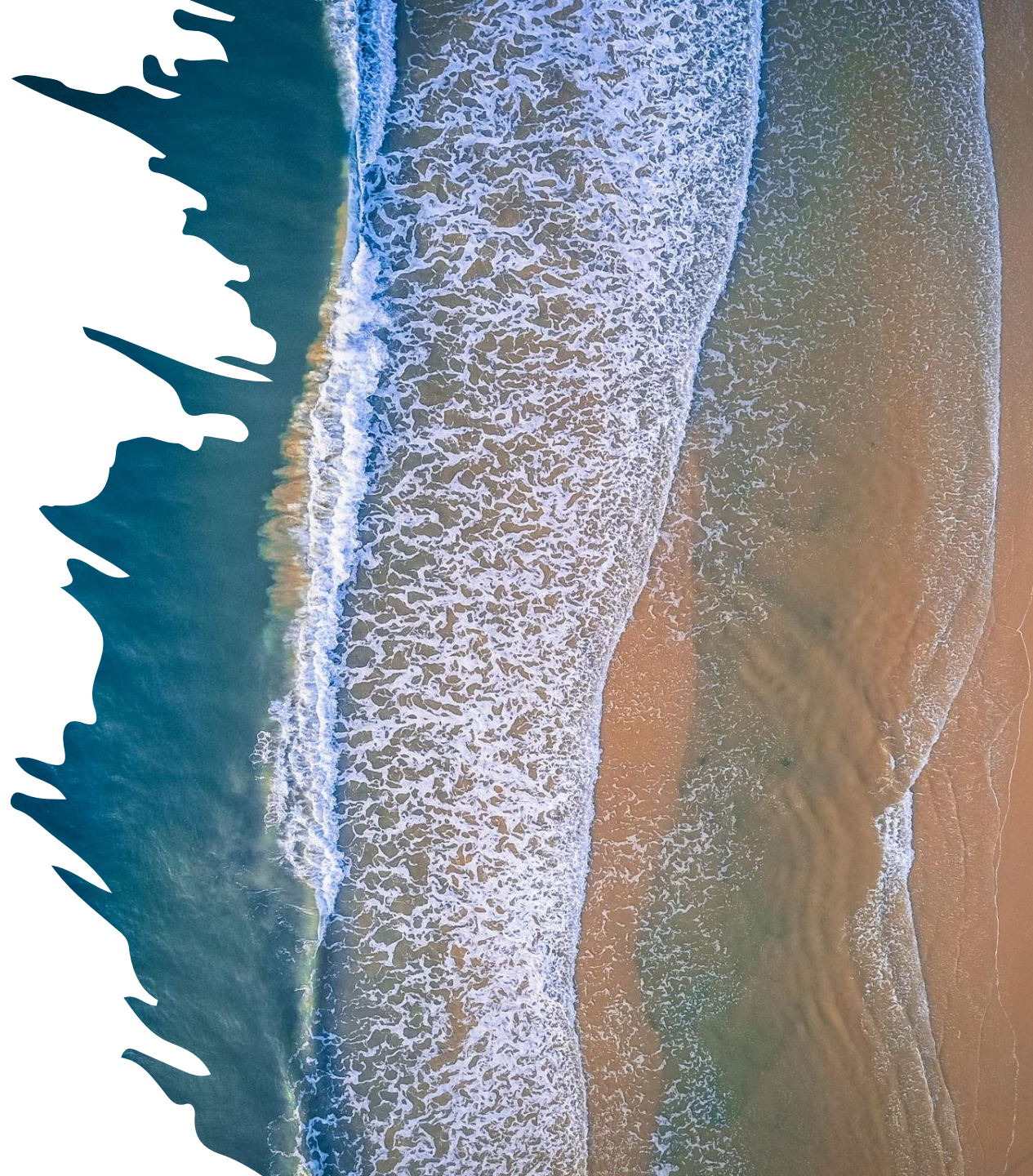
T-TIME COMMITTEE CHARGE CRITERIA	PUBLIC INPUT SURVEY 2021	EASTHAM MARKET STUDY 2021	5-YEAR STRATEGIC PLAN	HOUSING PRODUCTION PLAN 2021	URBAN LAND INSTITUTE REPORT 2017	LONG RANGE PLAN	NORTH EASTHAM STUDY 2007
Consider unmet community needs	<ul style="list-style-type: none">Housing should benefit those who live/work in the communityPreference for workforce/starter housing and downsized housing for seniorsRental housing a needYouth “underserved”Preference for outdoor recreationStrong preference for services for year-round residents	<ul style="list-style-type: none">Workforce is a constraint for industries across the boardCost and low availability of housing, childcare, medical services are major barriers to attracting employeesIncreasing the supply of workforce housing is a high priority	<ul style="list-style-type: none">Create a new community center for all ages through new construction or reuse of existing facilities.Expand recreational after-school and other community-wide programsIncrease the number of accessory dwelling units (ADUs) to provide flexible living options for residentsMake suitable land available for affordable housing	<ul style="list-style-type: none">More subsidized rental housingStarter housing for younger workers and families, whose numbers are decreasingMake suitable land available for affordable housing	<ul style="list-style-type: none">When building a Town Center, it is suggested that a new senior center be included in any redevelopment plan (the current one is 30 years old)For an expanded year-round economy, thoughtfully designed affordable housing is needed to support businesses and workforce	<ul style="list-style-type: none">Consider recreation needs in the development of plans for the Town Hall area and for the Route 6 and Brackett Road areaAdditional day care and summer programming needed for children and youth	
Infrastructure improvements	<ul style="list-style-type: none">Concerns about Route 6 traffic at T-Time	<ul style="list-style-type: none">Wastewater/septic limitations are barrier to future business development opportunitiesExpanded high-speed Internet could better meet the needs of self-employed and home-based workers	<ul style="list-style-type: none">Redesign Route 6 to improve safety and reduce speedsCreate connectivity between businesses on Route 6 to minimize vehicle activityImplement Complete Streets pedestrian and cyclist accommodationsImplement innovative/alternative wastewater treatment options and identify core sewer service area(s)	<ul style="list-style-type: none">Eastham’s lack of centralized wastewater infrastructure will continue to limit residential and commercial development	<ul style="list-style-type: none">Re-design Route 6. - the “Main Street” that traverses the commercial corridor is a 40 MPH four-lane state highwayCreate a pedestrian walkway for Route 6Lack of mobility/ walkability - implement Complete Streets	<ul style="list-style-type: none">Develop a pedestrian walkway system in local business centers to encourage small-scale boutique commercial developmentCreation of a road loop that would connect Route 6 in the vicinity of the Four Points Hotel to Brackett Road.	<ul style="list-style-type: none">Connect the Cape Cod Bike Trail to surrounding neighborhoods and commercial areas along Brackett, Route 6, and Holmes Road
Consider current and potential future zoning	<ul style="list-style-type: none">Mix housing with other uses	<ul style="list-style-type: none">Regulations and unfriendliness to commercial development common barriers cited by business community	<ul style="list-style-type: none">Research model bylaws and work to draft form-based code regulationsAdopt inclusionary zoning	<ul style="list-style-type: none">Increase densityAdopt inclusionary zoning	<ul style="list-style-type: none">Eastham should adopt a form-based code that will allow the Town to combine the mix of uses for new development	<ul style="list-style-type: none">Amend the Zoning Bylaws to improve economic development opportunities in Eastham	<ul style="list-style-type: none">Local regulations and policies must be geared toward facilitating the unique characteristics of a traditional New England town center.

Attachment 3:

T-Time Community Input Survey

T-Time Community Input

2021 SURVEY RESULTS



Survey Structure + Outreach

Survey Structure

- One step in a bigger community input process
- Preference Survey = public opinion
- Convenience Sample of both Eastham residents and non-residents
- 17 questions total – 3 main sections

Survey Outreach Campaign

- Press Release
- Radio
- News Articles (3)
- Social Media
- Word-of-mouth
- T-Time website – www.easthamttime.org
- Emails (23) – ttimecommittee@eastham-ma.gov
- T-Time voice mailbox
- T-Time Committee Meetings public comment
- Targeted stakeholder outreach



Stakeholder Engagement

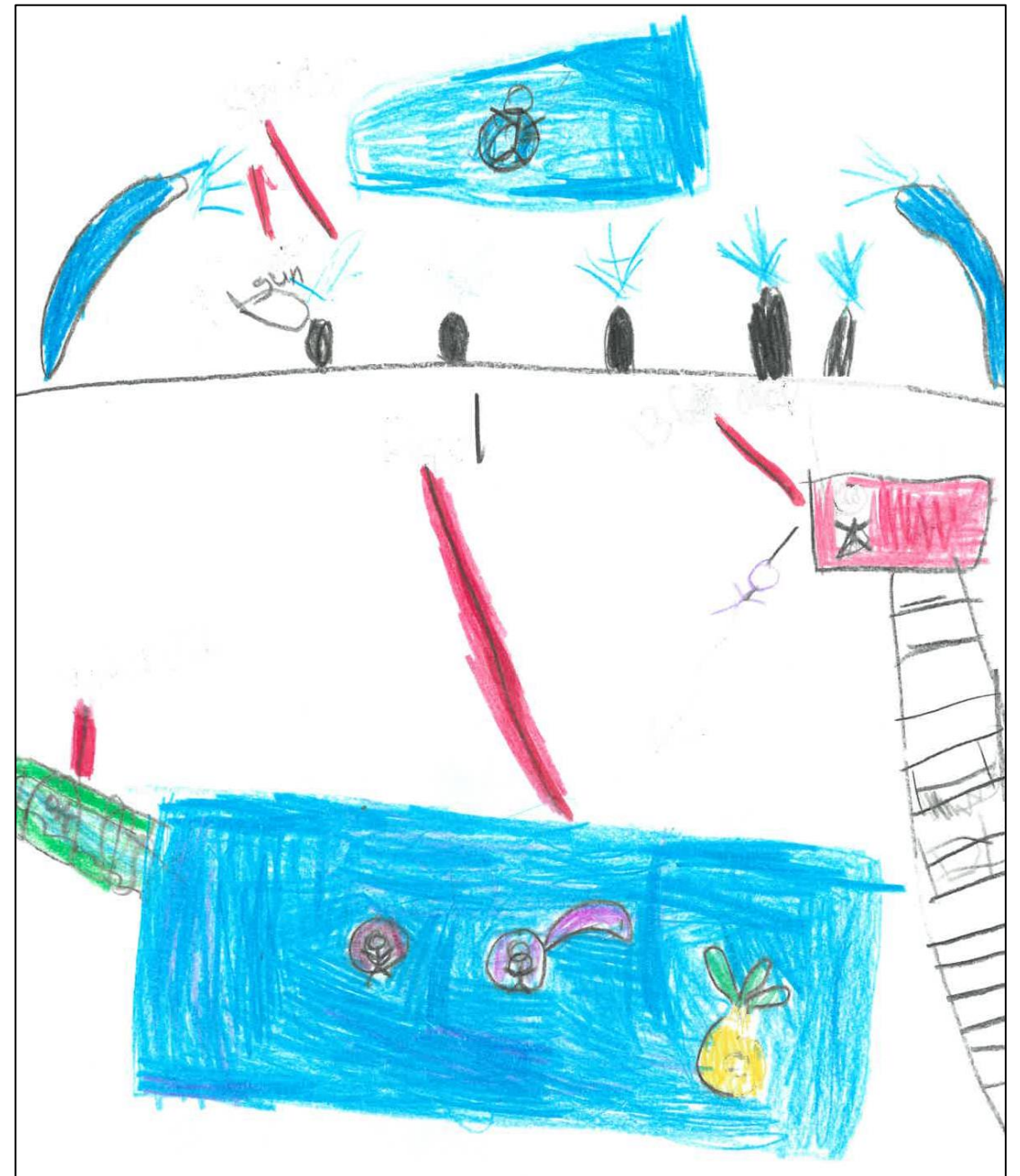
Targeted outreach to 29 community groups – potential reach of 12,565 via Facebook, e-newsletters, and membership (not all responded)

- Chapel in the Pines
- Cape Cod Children's Place
- Community Development Partnership
- Eastham Affordable Housing Trust
- Eastham Chamber of Commerce
- Eastham Council on Aging
- Eastham Dog Owners Association
- Eastham Elementary School
- Eastham Elementary School Parents Group
- Eastham Fabulous Flower Islands (EFFI)
- Eastham Historical Society
- Eastham Painters Guild
- Eastham Part-Time Resident Taxpayer Association
- Eastham Public Library
- Eastham Recreation Commission
- Eastham School Committee
- Eastham Tennis and Pickleball Club
- Eastham United Methodist Church
- Elk's Club
- Friends of Eastham Council on Aging
- Friends of Eastham Library
- Homeless Prevention Council
- Lion's Club
- Nauset Baptist Church
- Nauset Regional High School
- Orleans Farmers Market
- Windmill Weekend Committee



T-Time

*In My Opinion I think the T-Time property should be a go kart track. first kids like to drive go karts cause its fun. It would be fun to go as fast as a real car. There would be 20 cars. These are the reasons why I feel like there should be a go cart race at the T-time property.

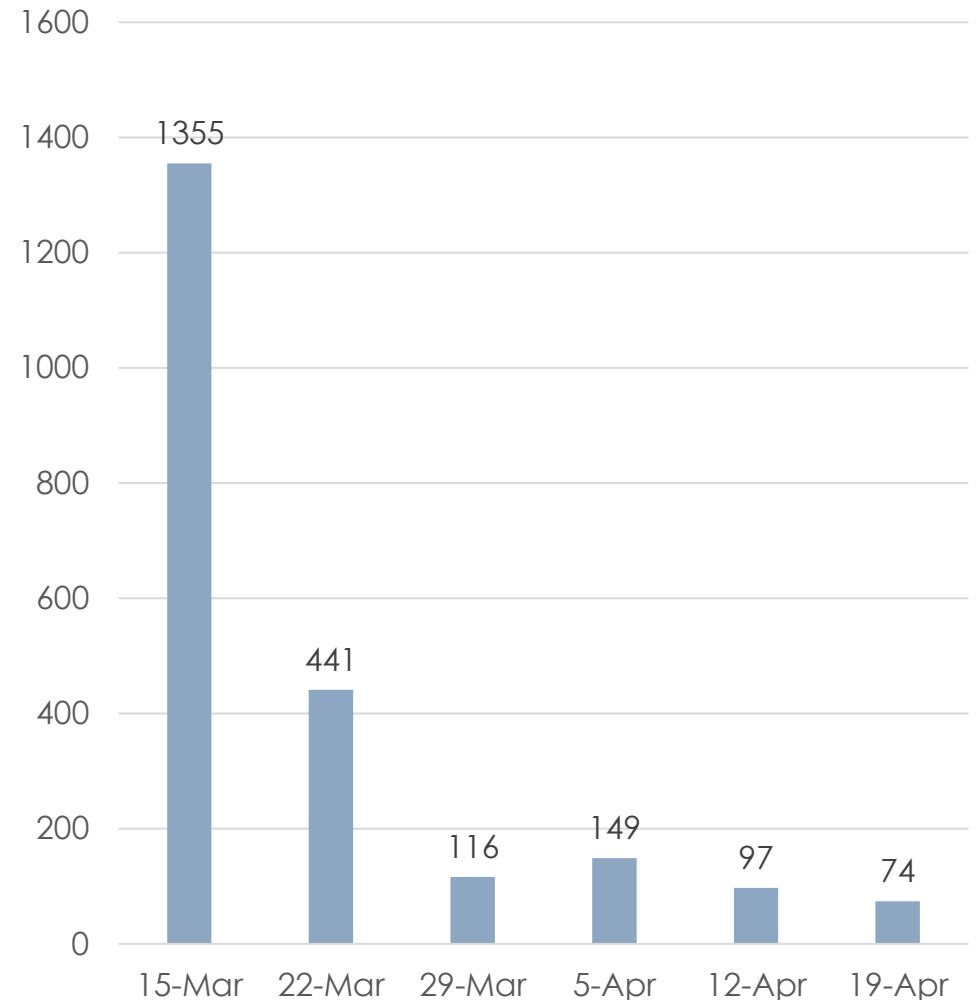


Drawings and "Opinion Pieces" Courtesy of EES 2nd graders

Survey Responses: A Snapshot

- Open March 15 – April 20
- 2,252 Total Respondents (n=2252)
 - 2,232 electronic; 20 hard copies
 - 2,662 Open-Ended Comments
- 81% completion rate
- 60% of responses returned during 1st Week (March 15)
- Response numbers wane as the survey progresses – typical response pattern

Number of Survey Responses
by Week



Data Analysis: **Overview of Process**

- Significant response = extra time taken for analysis
- Dataset cleanup – abandoned, duplicates
- Review for recurring themes
- Controlled for residency, age, work status
 - No major difference in responses, with exception of slight housing preference variation by work status (working respondents preferred more than retirees)
- Analysis of open-ended comments for themes, pro/con sentiment
- Additional analysis through word clouds for frequently used words

Respondent Demographics

Residency

- 52.7% year-round
- 32% part-time
- 8% Eastham business owners
- Other: school families, renters, ties to Eastham

Homeownership

- 47% own a home in Eastham

Employment Status

- 42% retired

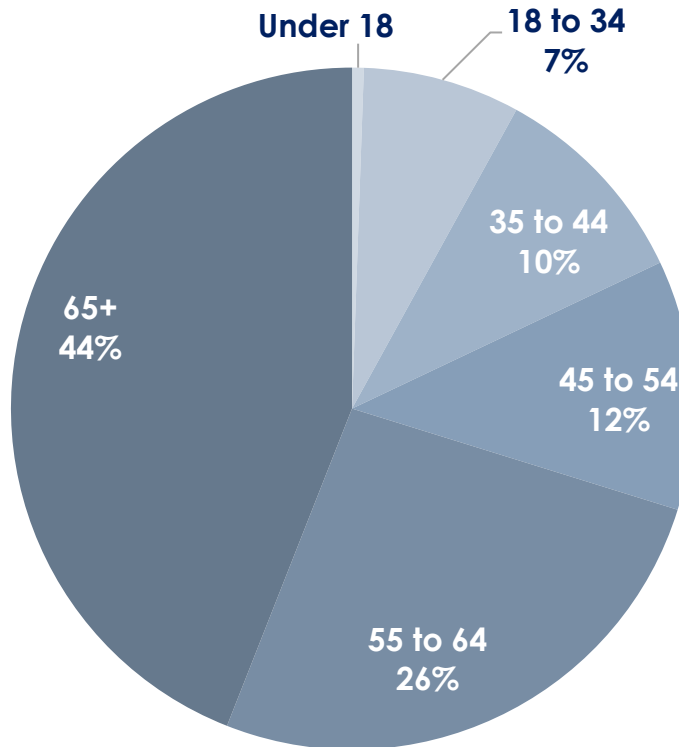
*Note: some demographic questions asked respondents to "choose all that apply," therefore totals may not add up to 100%



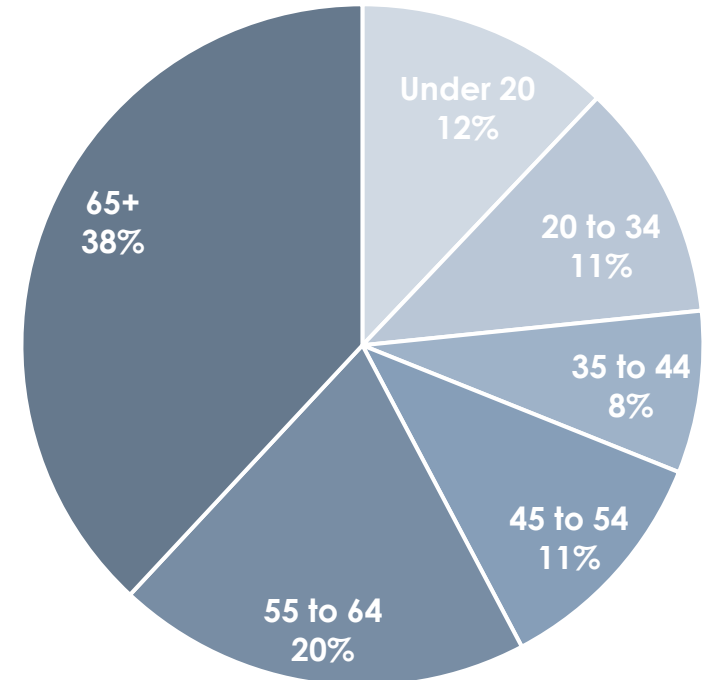
Respondent Demographics (cont'd)

- **Age 55+ = 70%**
(over-represented compared to 58% of Eastham's population)
- **Under 45 = 18%**
(under-represented compared to 31% of population)

Survey Respondents by Age



FOR COMPARISON:
Eastham Town-wide
Population by Age



A photograph of a paved path winding through a dense forest. The path is bordered by a wooden railing on the right side. The trees are tall and leafy, creating a canopy overhead. In the distance, a few people can be seen walking on the path. A semi-transparent grey banner is overlaid on the lower half of the image, containing the text.

Survey Section 1:

COMMUNITY CENTER/RECREATION

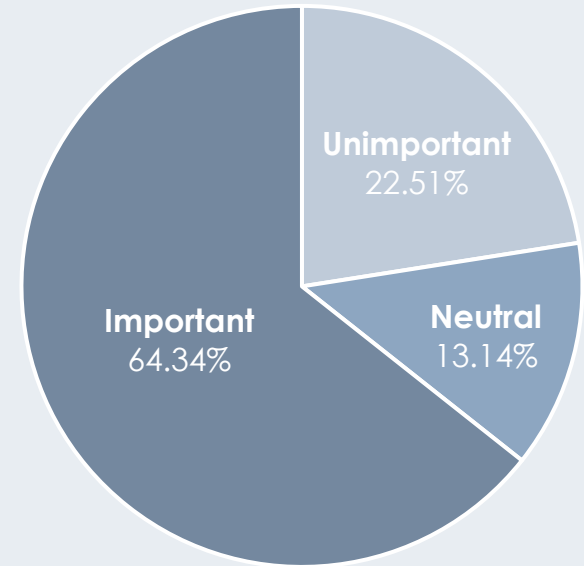
Section 1: Community Center/Recreation

Top Preferred Amenities:

- Outdoor gathering space (72% somewhat/very important)
- Large multi-purpose space (64%)
- Community garden space (61%)
- Group exercise/yoga (60%)
- Weights/cardio space (52%)

Lowest Ranking:

- Large public pool (37%)
- Artist studio space (37%)
- Music practice space (34%)
- Full-size indoor basketball court (32%)
- Community TV facility with studio space (26%)

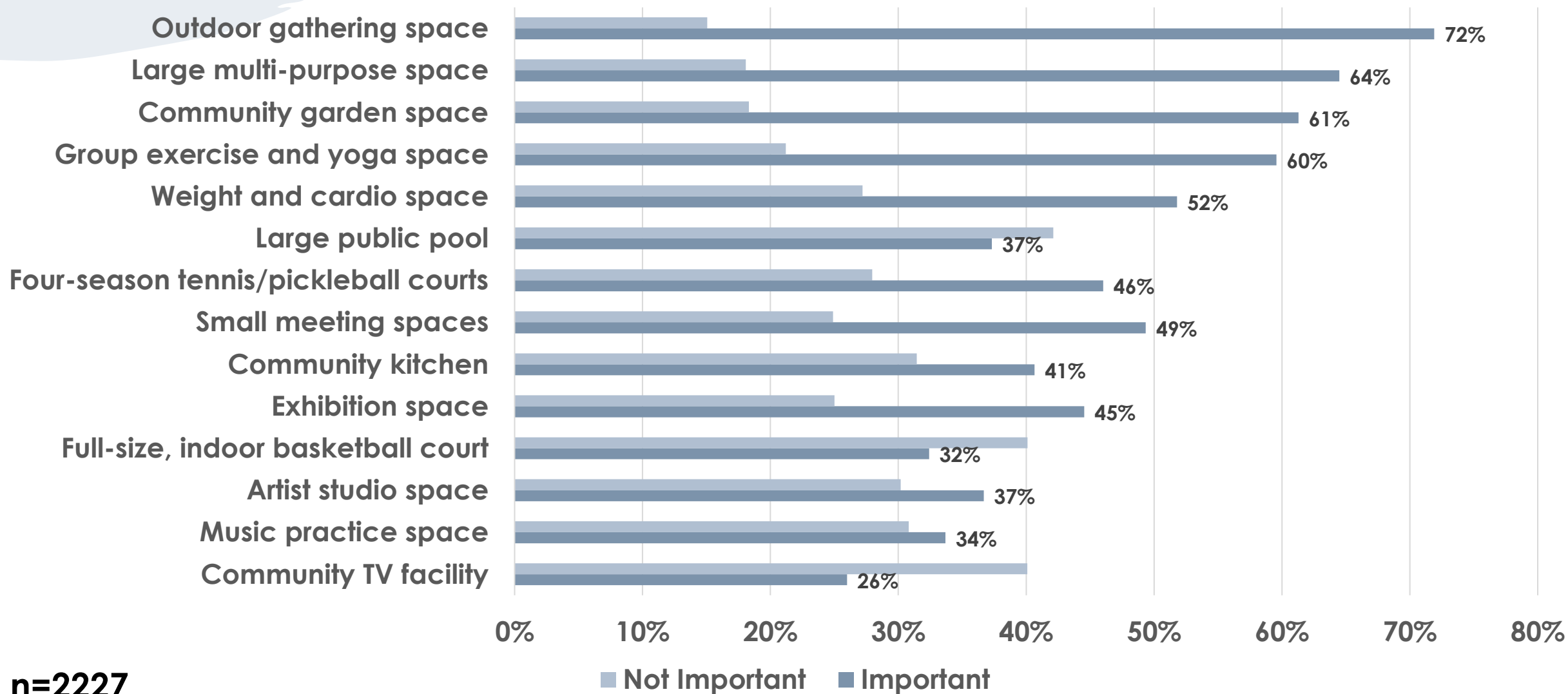


Importance of Community Center/Recreation at T-Time

3.7 out of 5 weighted average
(5 being most important)

Community Center/Recreation Preferences

Full Response Results by Importance



n=2227

Open-Ended Comment
Themes:

Community Center/Recreation

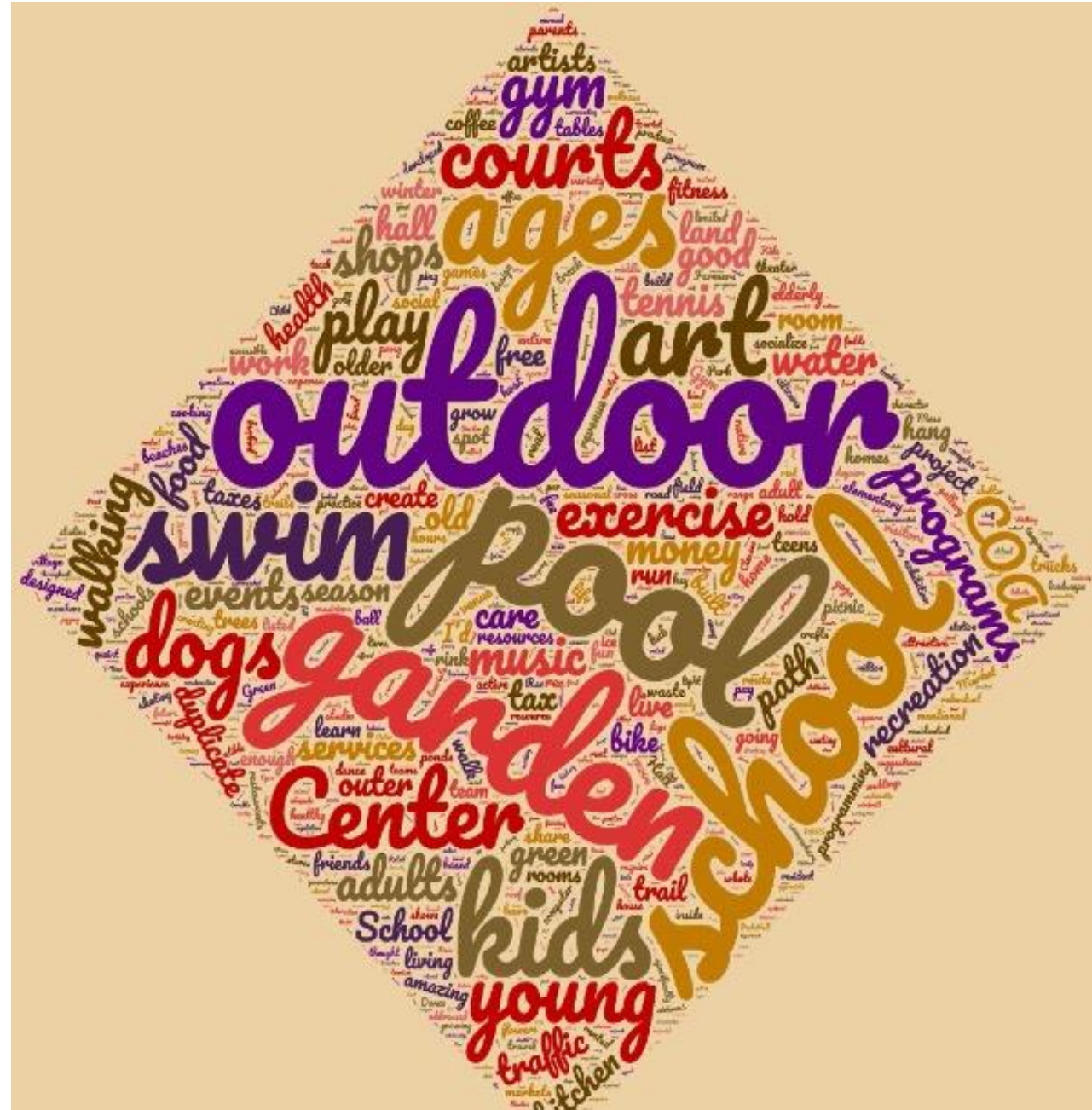
- Something for the community, not visitors
- Focus on all-ages use
- More enthusiasm for outdoors
- Community youth “underserved”
- Do not duplicate – complement or leverage existing resources and spaces
- Concerns about impact on taxes



n=906

Additional Analysis: Recreation Word Cloud

- “Outdoor” refers to “recreational” activities
 - “Programs” & space are top priorities
 - “Dog” friendly areas
- “Center” & “Ages” refer to a multi-generational gathering space
 - A place for the “COA”
 - After “school” programs for kids through high school.
- A community “garden” was very popular
- Do not “duplicate” existing resources; impact on “taxes”



“ Eastham lacks a nice
‘downtown’ area
where you can
walk/gather to get a
community
atmosphere.”

"I think we need to
challenge [our] go-to
concepts of
community center
and really take
advantage of the
beautiful landscape
that we live in by
making the majority
of the space
outdoor.”

""Put in a sidewalk
alongside the entire run
of Rt 6 from Brackett to
Nauset Rd. to make that
entire commercial district
more pedestrian friendly.
Also a back cut-through
to the bike path. This is
the largest open space
left for this type of
community space.”

“Not interested in indoor
community space. TOO
much cost and upkeep.

And waste of space in
winter. And who would be
allowed to use it on our
taxpayer money? It would
be great to have outdoor
only facility and make it
beautiful. Connect to bike

Path, outdoor park,
volleyball court, basketball
court, grassy areas, picnic
areas, art and sculpture
space and [even] a place
for food trucks.”

Open-Ended Comments: **Community Center/ Recreation**

“A place where locals can gather”

We have the potential to test many of these recreation preferences through inexpensive on-site “testing” activities.

Social/public space

Access point to Rail Trail

Walking trails

Shade trees

Picnic area

Benches

Playground

Gazebo

Food trucks

Dog-friendly

Skate park

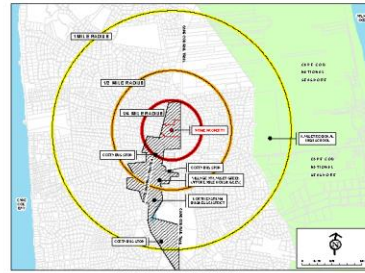
Sculpture space

Small music/theatre performances

Disc golf

Shuffleboard/Bocce

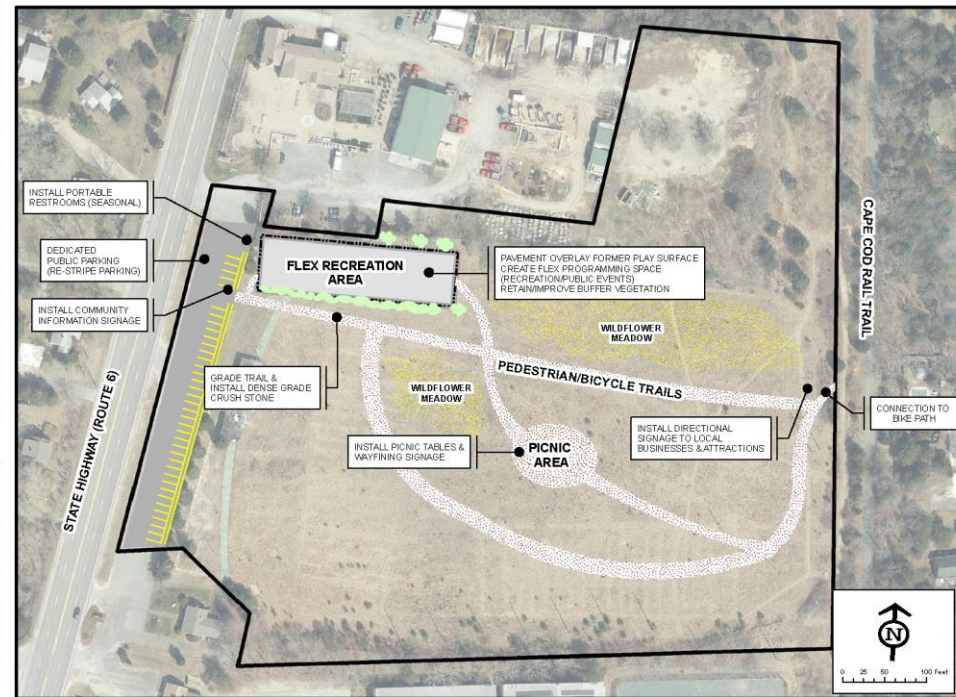
EASTHAM: T-TIME SITE ACTIVATION



WAYFINDING & LINKS TO BUSINESSES



SHARED USE PATH W/ WILDFLOWERS



PICNIC AREA



CHALK ART ZONE



Survey Section 2: HOUSING

Section 2: Housing



When asked about overall importance of housing at T-Time **responses were split**



60% said mixed-use important

52% said a mix of housing types important



Most Preferred:

Workforce housing (57%)

Senior housing (53%)

Starter homes for families (48%)



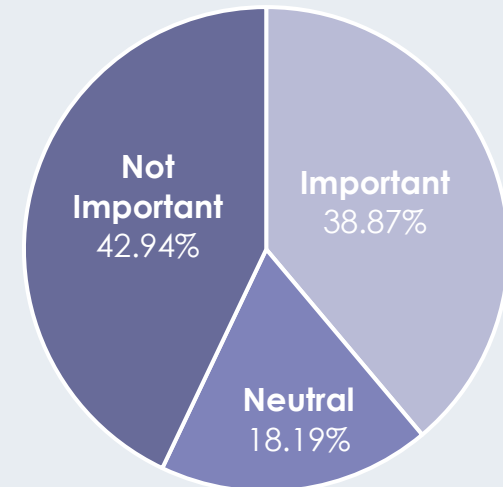
Least Preferred:

Seasonal workforce housing (34%)

Land trust model (27%)

Live-work spaces (23%)

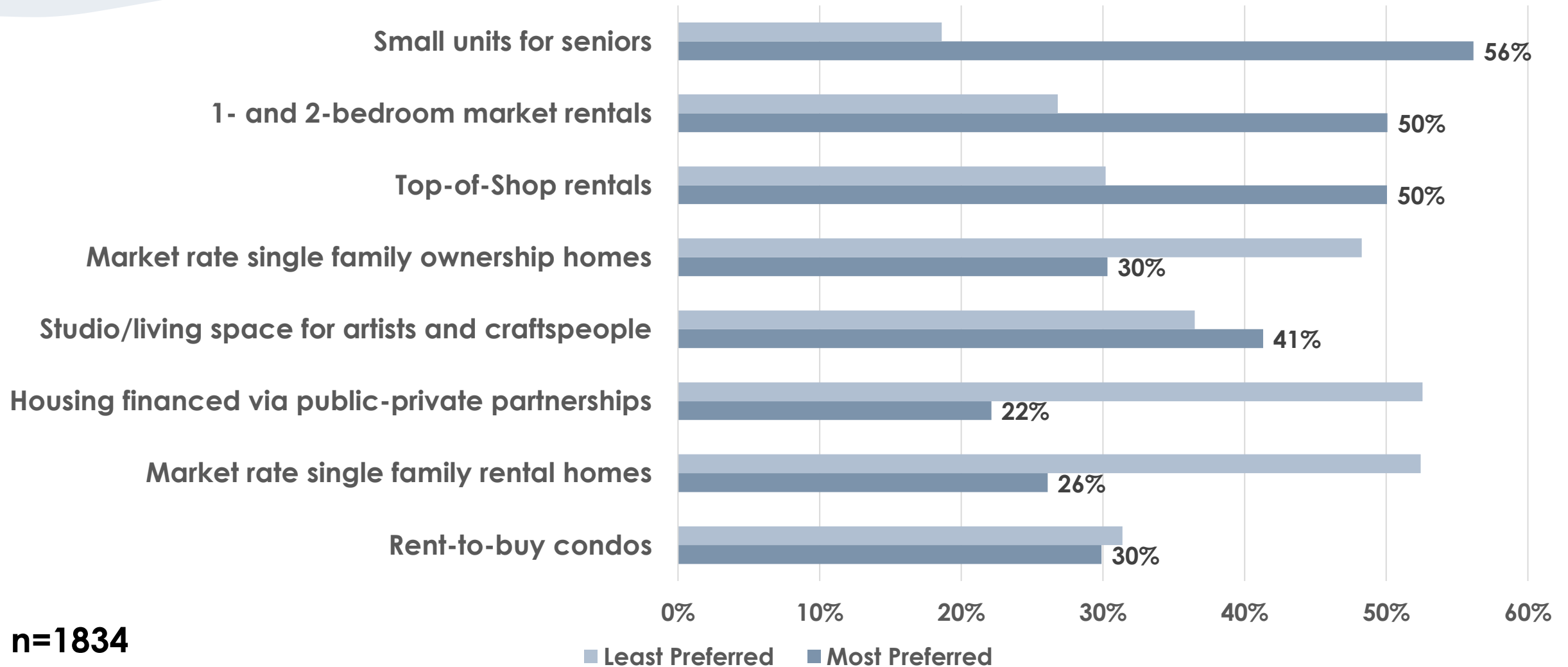
Importance of Housing at T-Time



3.0 out of 5 weighted average
(5 being most important)

Preferred Housing Types for T-Time

Full Response Results



n=1834

Open-Ended Comment Themes:

Housing

- Opinions on housing and density split
- Housing that “benefits all”
- Include open/green space
- Housing is needed but “not here”
- “Market rate affordable” is not affordable for local workers
- Village at Nauset Green example of undesirable design aesthetic
- Concerns about traffic on Route 6, increased service demand
- Strong desire to preserve character of Eastham
- Call to address zoning, rehab of existing properties



n=708

Additional Analysis: Housing Word Cloud

- Housing is “need” but not at T-Time
- Community “Center” important
- “Seniors,” “workers” & “young families” need attainable housing
- “Options” required: rentals, starter homes, housing for year-round workers and residents



"I don't believe tax money should go towards building housing. The town paid [for] this space and all of the town should be able to enjoy the benefits."

" We need housing for families most of all, of all types. The scale should be appropriate so not too much density. A mix of homeownership and rental."

"I'm a senior and we have options that others don't have. Let's use this land to build housing for workers and families who are priced out of the market. It's a rare opportunity to help those who work here and can't afford to live here."

Open-Ended Comments: **Housing**

"Please be mindful of what you mean when you designate something 'market rate.' Our Cape Cod housing market is absolutely ridiculous. If 'market rate' could take into account the median income of year-round residents working and living on the Outer Cape, that could create more equitable housing situations. I am so sick of seeing 'affordable market rate' housing listed as 600,000 2-bedroom/1-bathroom homes. That is not equitable. That is insanity."



Survey Section 3:
BUSINESS/ECONOMIC USES

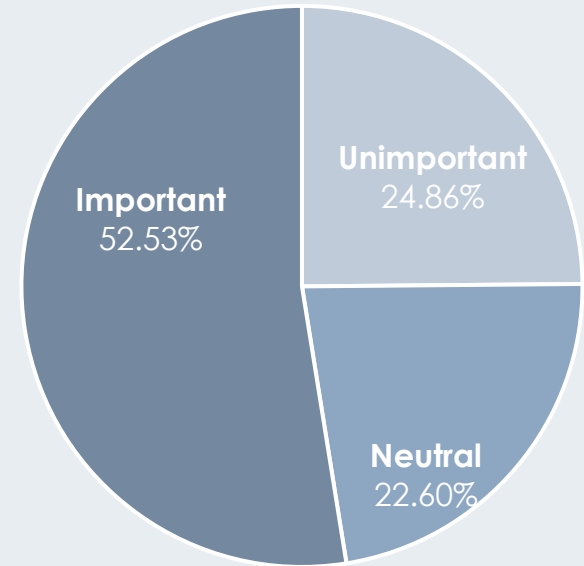
Section 3: Business/Economic Uses

Most Preferred:

- Farmers Market (63%)
- Artist/artisan storefronts (49%)
- Small business startup/incubator space (39%)
- Co-working or collaborative workspaces (38%)

Least Preferred:

- Retail space (26%)
- Professional office space (15%)
- Storage or workspace for trades, fishing, or shellfishing (15%)



**Importance of Business/
Economic Uses at T-Time**

3.4 out of 5 weighted average
(5 being most important)

Open-Ended Comment Themes:

Business/Economic Uses

- Focus on year-round business services
- Consider start-up or incubator space
- Support local
- Incorporate park/open space
- Include housing/mixed use
- Farmer's market, food, coffee
- Traffic/access in and out of site a concern
- Some said “none” - not a survey option



n=482

Additional Analysis: Business Word Cloud

- “Businesses” needed for local year-round community
- “Restaurants,” farmer’s “markets”, grocery “markets”
- Specific mention of offices - such as healthcare, doctors, dentists - and pharmacies





Business Wish List

Coffee shop

Healthcare offices

Pharmacy

Nicer restaurants

Book shop

Brewery

NOT Desired

Storage

Visitor-oriented businesses

Casual dining

“Big box” retail

Non-local businesses

“Just housing...
no businesses.”

"There are other
options for affordable
space for businesses -
- it's best to keep this
as a community
center, and keep
housing and business
space out of it."

"Allow T-time to flourish
with people, retail , farmers
market, small food options,
and put office space on
top...Tired of looking at
realty offices and dead
storefronts. Eastham has
NO VIBE. Tired, old and
looks like an afterthought
you pass through."

"If we are looking to create
a 'destination' location with
a unique feel a weekly
farmer's market, artists &
craftsman (think
Provincetown) and
innovative retail ideas will
keep the community
returning to investigate and
spend their money. This type
of location could give
Eastham the type of charm
that communities like
Wellfleet and Chatham
have."

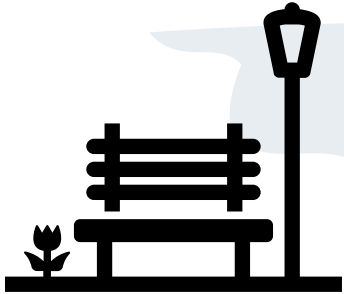
Open-Ended Comments: **Business/Economic Uses**



Conclusions:

SUMMARY AND NEXT STEPS

Summary of Findings



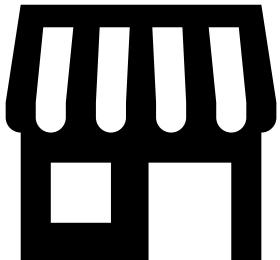
Community Center/Recreation

- Clear desire for local gathering space
- Strong preference for outdoor recreation
- Serve all ages – from children to seniors
- Explore ways to meet needs through existing space, resources



Housing

- Limited housing that benefits the community
- Mix housing with other uses
- Match the income of local workforce
- Give seniors a downsizing option



Business/Economic Uses

- Specific preference for local, small business
- Startup or incubator-type spaces
- Must support the year-round community, not just visitors
- Account for traffic impacts

Next Steps

- **What does this survey tell us? Where do we need more information?**
 - Survey is just the beginning for public input opportunities
 - This was an unprecedented community planning and public outreach effort for the Town
 - Future focus: targeted outreach to demographics less represented in the survey
- **Committee to thoroughly review survey results report and comments**
 - Side-by-side comparison with other data, committee research, and planning studies
- **Public invited to give feedback during regular T-Time Committee Meetings**
- **We will plan to hold additional public meetings and events in the future**

Attachment 4:
**Summary of Public Input
on Draft Recommendations**

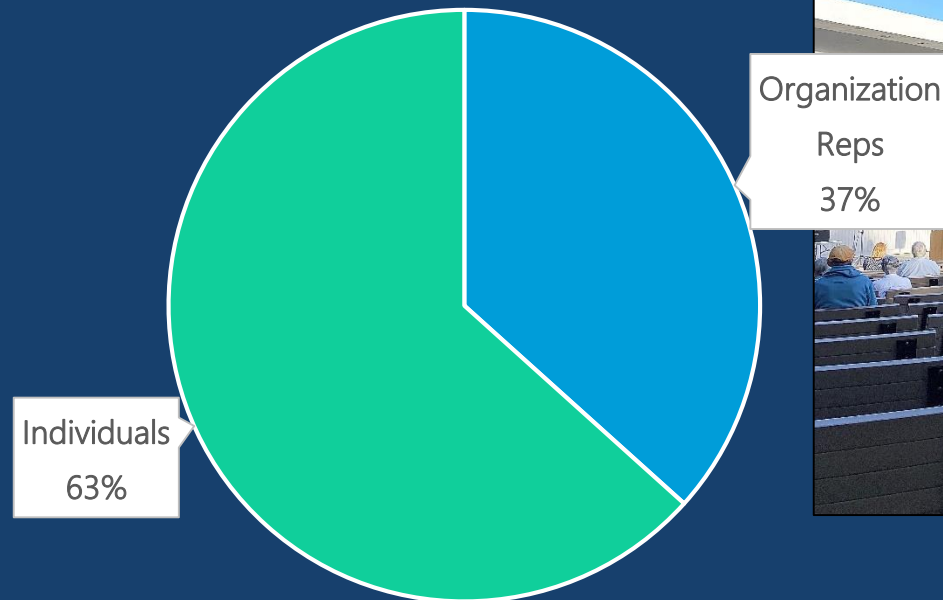
T-TIME COMMITTEE RECOMMENDATIONS OUTREACH

Summary of Public Input: August-October 2021

PUBLIC FORUM SERIES

PUBLIC FORUM SERIES

- (2) Virtual Forums: September 16, October 6 + (1) In-Person Forum: September 22
- Total attendance: 148
- Total written comments: 3
- Total speakers: 30
- Total repeat speakers: 4
- Speakers representing organizations: 11/30
- Full comment text in packet

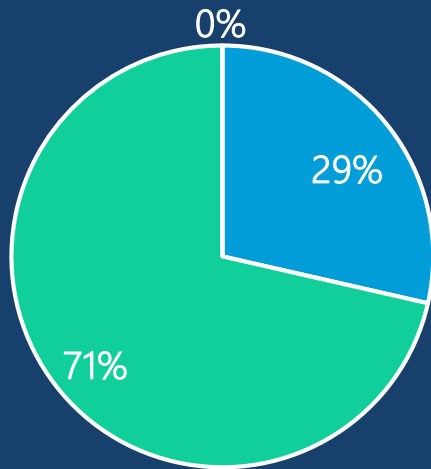


VIRTUAL FORUM ZOOM POLLS

IN-FORUM RESPONSES FROM 9/16 AND 10/6

What is your reaction to the draft recommendations for use of the T-Time Property?

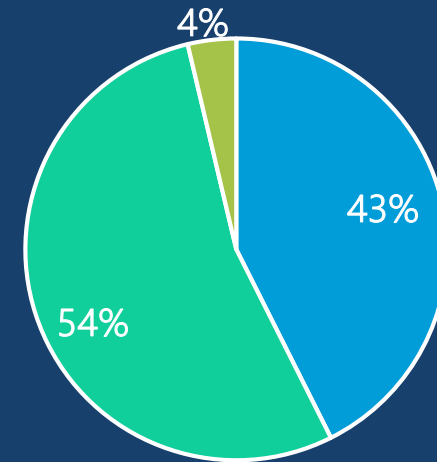
n=49



- AGREE WITH ALL aspects of the draft recommended uses - job well done!
- AGREE WITH SOME aspects of the recommended uses, but not others
- DISAGREE WITH ALL aspects of the development guidelines - committee should go back to the drawing board

What is your reaction to the draft recommended uses for the Town Center Plaza property?

n=54

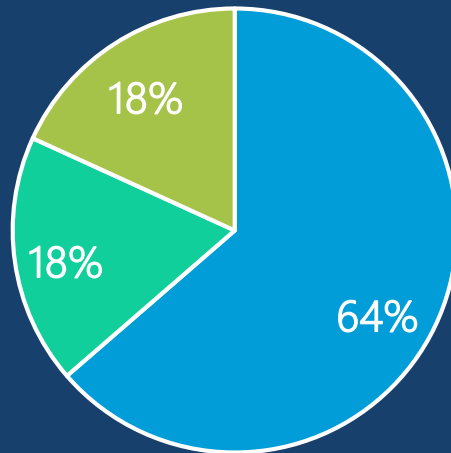


- AGREE WITH ALL aspects of these draft recommended uses - job well done!
- AGREE WITH SOME aspects of these recommended uses, but not others
- DISAGREE WITH ALL aspects of these recommended uses - committee should go back to the drawing board

VIRTUAL FORUM ZOOM POLLS

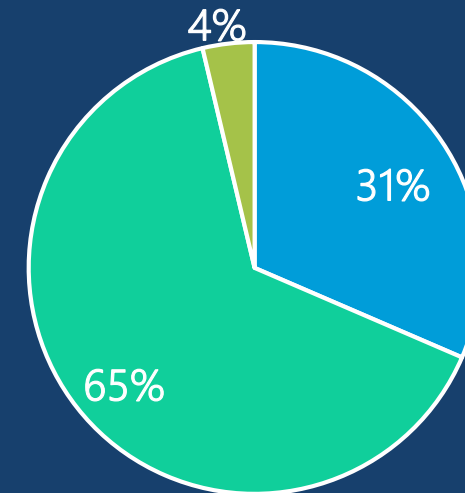
IN-FORUM RESPONSES FROM 9/16 AND 10/6

What is your reaction to the draft recommended uses for the COA property, should it become available?
n=55



- AGREE WITH ALL aspects of these draft recommended uses - job well done!
- AGREE WITH SOME aspects of these recommended uses, but not others
- DISAGREE WITH ALL aspects of these recommended uses - committee should go back to the drawing board

What is your reaction to the committee's draft Development Guidelines?
n=54



- AGREE WITH ALL aspects of the draft development guidelines - job well done!
- AGREE WITH SOME aspects of the development guidelines, but not others
- DISAGREE WITH ALL aspects of these recommended uses - committee should go back to the drawing board

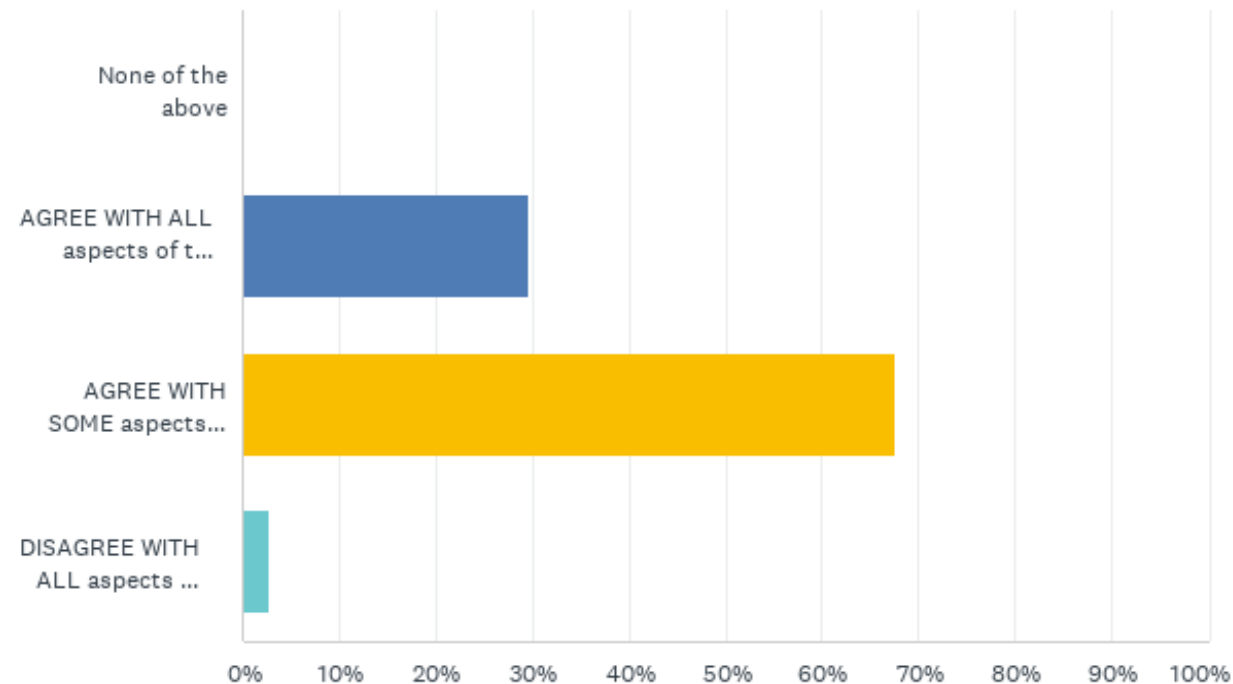
QUICK REACTION POLL

QUICK REACTION POLL

- **OPEN DATES:** September 1 – October 14 (*7 weeks*)
- **207 RESPONSES** via 2 **COLLECTORS:**
 - General Audience – 134 responses
 - 40-and-Under (sent via 1000 postcard mailer) – 71 responses



Q1 The Town of Eastham's T-Time Development Committee has drafted a list of RECOMMENDED USES for the T-Time property, including: Public Community Center Building anchored by the Council on Aging and Recreation Department Community Pool (more info needed before final recommendation) Some senior and workforce/community housing Artist shacks/entrepreneur pop-up space Lots of outdoor green space for gathering and recreation Multi-/inter-generational focus What is your reaction to these recommendations?



QUICK REACTION POLL SUMMARY: T-TIME PROPERTY


- Keep this property recreation- and open- space focused
- Maintain public access / use of the parcel
- Create a walkable downtown feel – a car-free space, access to CC Rail Trail
- Housing for workforce, existing residents
- Limit new buildings and repurpose existing ones where possible to minimize impact
- Be a leader for sustainable development practices

DRAFT RECOMMENDATIONS	AGREEMENT WITH RECOMMENDATIONS	DISAGREEMENT/ MIXED RESPONSE
Public Community Center Building	X	
Community Pool		X
Senior and Workforce Housing		X
Artist/ entrepreneur space		X
Outdoor green / gathering space	X	
Multi- / inter-generational focus		X

QUICK REACTION POLL SUMMARY: T-TIME PROPERTY

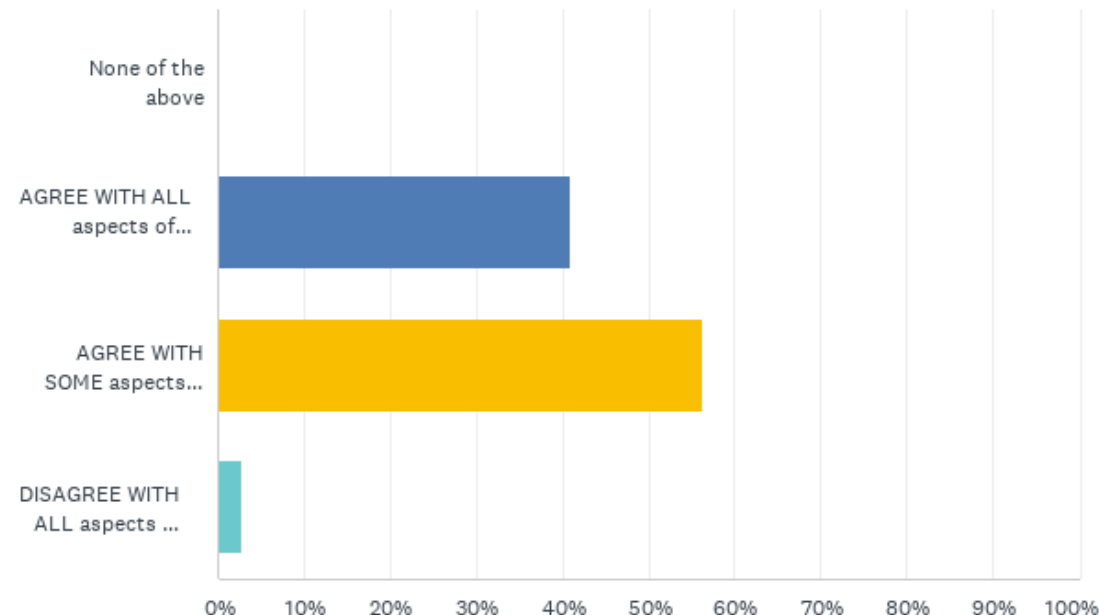
OTHER FEEDBACK:

- Youth/child services
- Splash pad
- Playground
- Town parking for bike path
- Food truck space
- Indoor walking track
- Set aside property for future Town needs



"I moved here 8 years ago and since have had two kids. My husband and I are constantly considering leaving Eastham with our young family because we do not feel that there is anything here that supports young families with kids."

Q3 In addition to considering possible uses for the T-Time property, the T-Time Development Committee is also considering how community needs could be met strategically through the recently-acquired Town Center Plaza property (4550 State Highway) and the property which currently houses the Town Council on Aging (1405 Nauset Rd and 0 Martha St). The Committee's draft recommendations include the following acceptable uses for TOWN CENTER PLAZA: Accommodate space needs of the 6 existing businesses Farmer's Market Medical Office Space Retail and Restaurant Space Top of Shop Housing Senior and/or Workforce Housing What is your reaction to these recommendations?



QUICK REACTION POLL SUMMARY: TOWN CENTER PLAZA

- Desire for mixed use – emphasis on
 - retention of current businesses
 - attainable commercial space for small business
 - year-round jobs
- Create a walkable downtown feel – car-free, parking off-site
- Rental housing, housing for workforce and existing residents
- Be a leader for sustainable development practices

DRAFT RECOMMENDATIONS	AGREEMENT WITH RECOMMENDATIONS	DISAGREEMENT/ MIXED RESPONSE
Retain 6 existing businesses	X	
Farmers Market		X
Medical office space		X
Retail and restaurant space	X	
Top-of-shop housing	X	
Senior and workforce housing		X

QUICK REACTION POLL SUMMARY: TOWN CENTER PLAZA

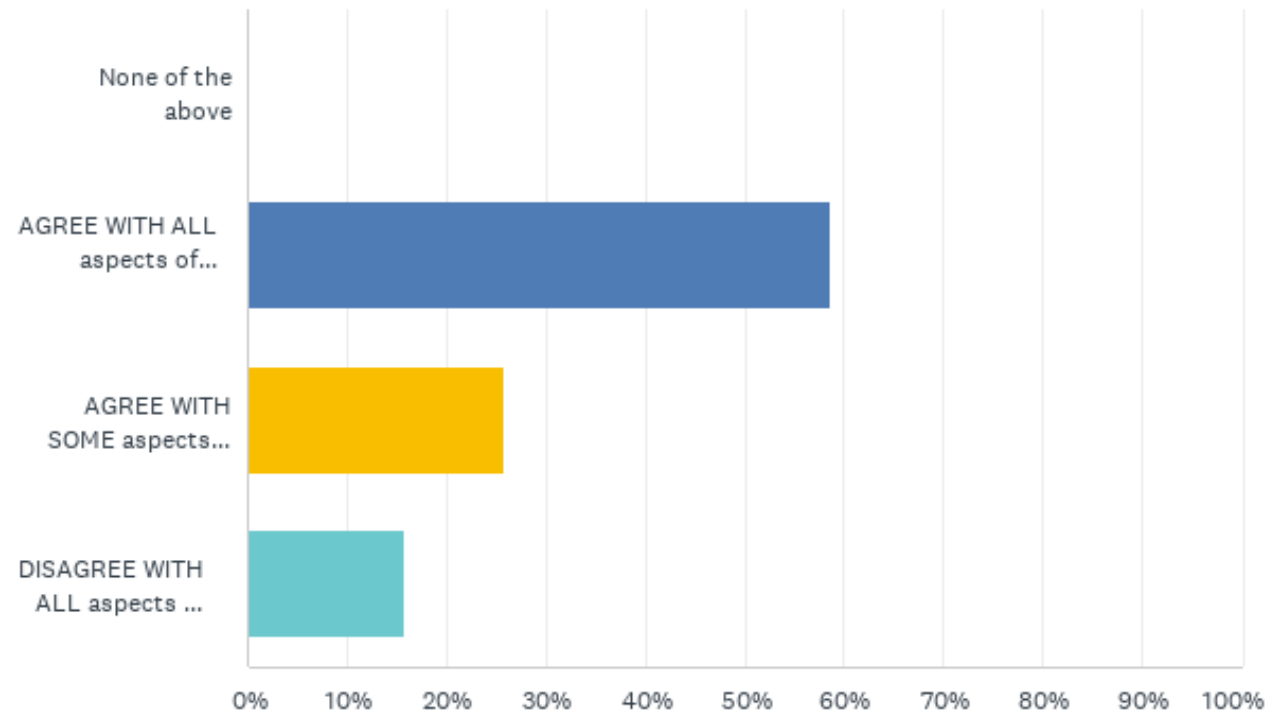
OTHER FEEDBACK:

- Outdoor dining space
- Make sure transportation is aligned with housing
- Accessibility concerns for top-of-shop housing
- Concerns about oversaturation of services for medical and farmers market

“New medical building going in Orleans. We should not use prime real estate for another one. Agree with top of shop housing, but no additional housing. The property should be used to create more quality jobs.”

“WE NEED MEDICAL facilities in Eastham...VERY NECESSARY. There are many who are unable to drive so this would enhance the services of Eastham and support its senior population and families.”

Q4 The Committee's draft recommendations include the following acceptable uses for the current COA PROPERTY: Affordable Housing Senior and/or workforce housing Housing compatible with goals outlined in Eastham's recently updated Housing Production Plan What is your reaction to these recommendations?




QUICK REACTION POLL SUMMARY: COA PROPERTY

- Housing use favored
- Concerns about COA and where it would be relocated – desire to keep current use if possible
- Uncertainty around need for senior-specific housing
- Housing should be prioritized for Eastham residents, workforce
- Town should control development where housing is involved

OTHER FEEDBACK:

- Consider medical space, assisted living, adult daycare
- Consider selling the property and using money to fund work on other two sites



“It is key that the town takes ownership for meeting affordable housing needs to prevent developers from making the decisions for us.”

QUICK REACTION POLL SUMMARY: DEVELOPMENT GUIDELINES

AGREE WITH DRAFT RECOMMENDATIONS

- Green space
- Sustainable focus
- Traffic impacts
- Public access

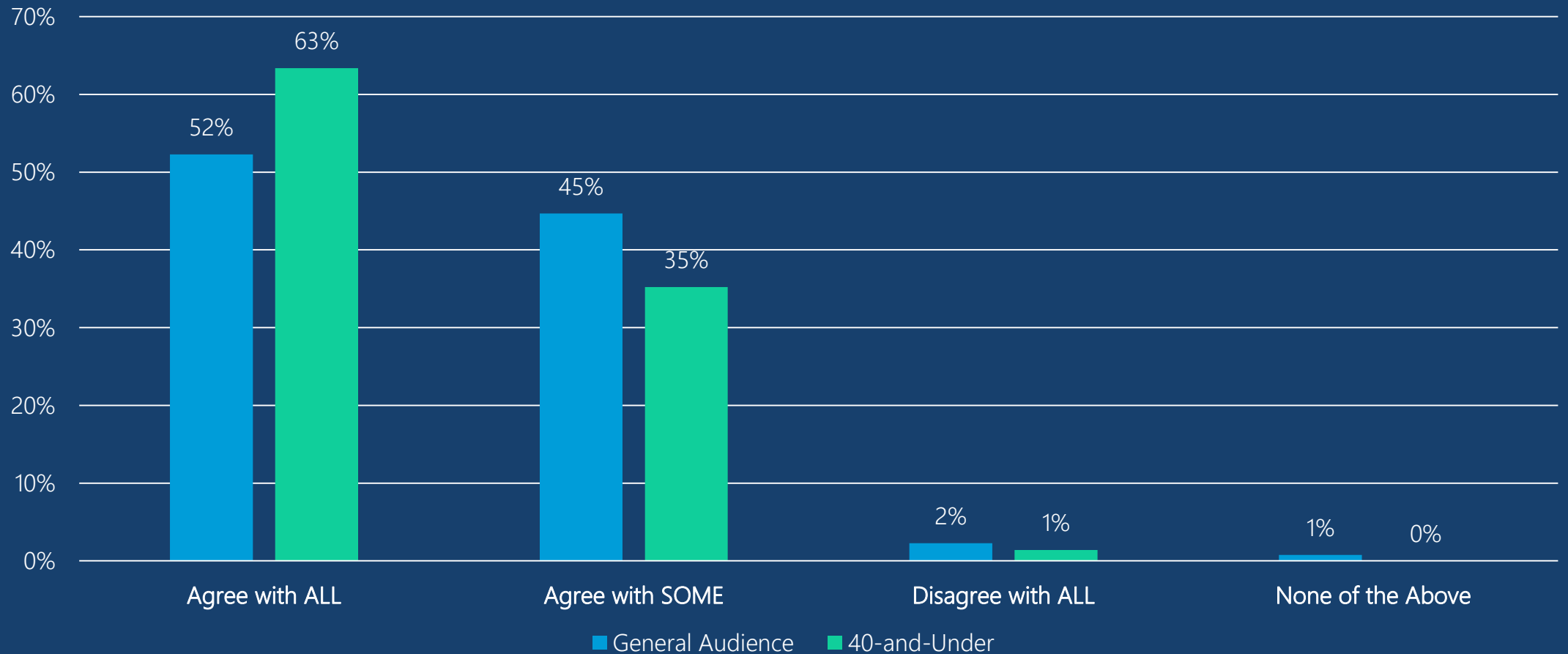
DISAGREE/MIXED RESPONSE

- Whether to go for more or less density

OTHER FEEDBACK

- Don't sacrifice the character of Eastham for development
- Focus on year-round businesses and community services
- Youth and family services needed

COMPARISON BY COLLECTOR: DEVELOPMENT GUIDELINES

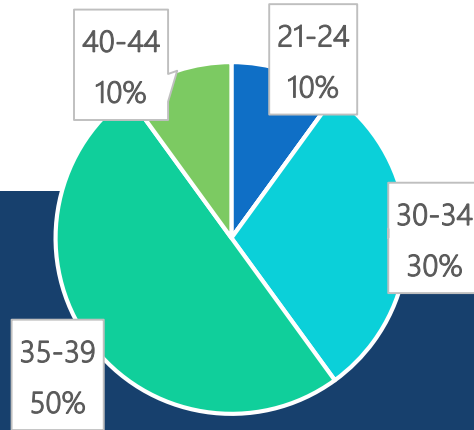


QUICK REACTION POLL SUMMARY: COMPILED QUESTIONS

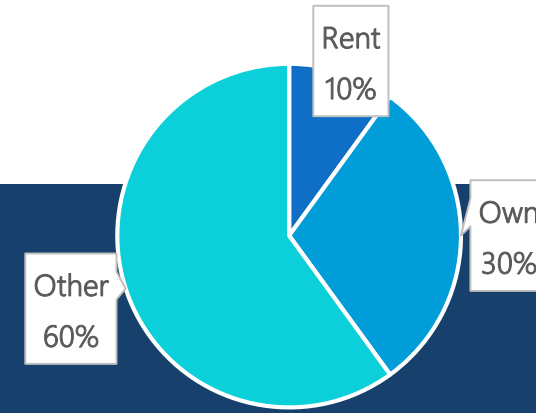
- What will the recommended uses look like? Need more details and visuals
- What do you mean when you say....multimodal, multi-generational, "good" jobs, "look and feel" of Eastham?
- Why is the T-Time Committee looking at the Town Center and COA properties?
- Why do these properties need to be developed? Why does the town want to make Eastham like Orleans, Chatham, etc.?
- What is the overall process and timeline for this work?
- Will the town be leasing parcels? Selling? How will development happen?
- Will professional designers/architects be brought in to work on this project and serve on a design review board?
- Where can we view video from the virtual forums?
- What other uses were considered for the COA property besides housing?
- Can you clarify the need for senior-specific housing?
- Can we wait to see how recent housing will impact infrastructure before we build more?
- When will cost estimates and tax impact information be available?
- Who are we trying to attract to Eastham? This should be answered before action is taken

40-AND-UNDER FOCUS GROUPS

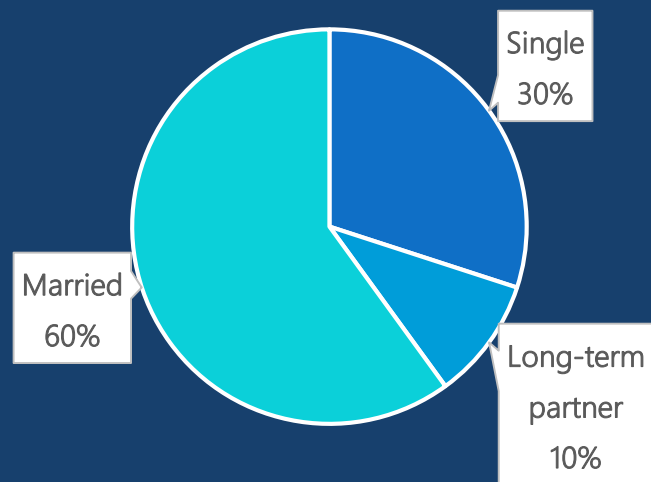
Age of Focus Group Participants



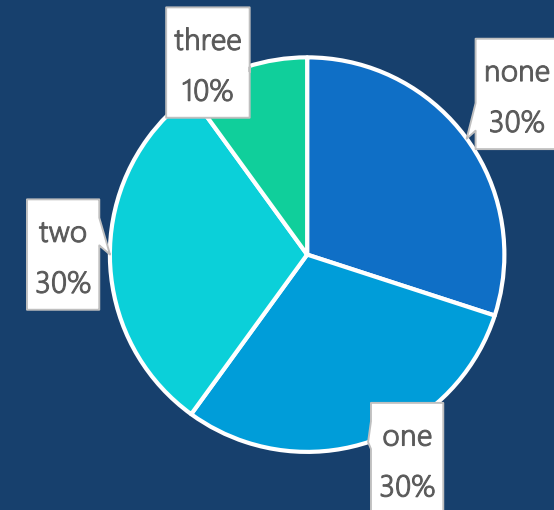
Own, Rent, or Other?



Marital Status of Focus Group Participants



Number of Children



40-AND-UNDER FOCUS GROUPS: THEMES ACROSS ALL GROUPS

- Unmet needs for children/youth and families
- Desire for walkable, “car free” spaces
- More spaces needed for “running into” each other, community-building
- Sustainability / green development as a core part of Eastham’s identity
- Housing support, rentals for working young adults, families
- Startup and affordable commercial space

Attachment 5:
Eastham Market Study

Town of Eastham Market Study

April, 2021



Prepared by
Community Opportunities Group, Inc.

With
Lisa Davis Associates

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Introduction

This market study was commissioned by the Town of Eastham as part of an effort to collect and analyze data to inform the creation of an economic development plan as well as to assist the Town to determine potential uses for the 'T-Time property,' located at 4790 State Highway Route 6.

The consultants worked with the Town of Eastham Planning Department with input from the T-Time Development Committee. The consultants carried out a series of focus groups and interviews with business owners, representatives from local and regional organizations, and other stakeholders to gather observations about trends, opportunities, and barriers for various industry sectors. The Town also conducted a survey of business owners to gather input for the study.

The first section of the report provides an overview of current land use and recent land use planning efforts related to economic development in Eastham. The second section provides an economic profile of the community based on a variety of available data sources to describe Eastham's population, workforce, economic base, and an analysis of retail leakage and gaps. The third section focuses on local and regional market trends overall and for each of the industry sectors important to Eastham. The fourth section identifies barriers that need to be addressed in order to attract viable commercial development. All of these findings are brought together in Section 5, which summarizes development opportunities and needs, including commercial land uses for which there is unmet demand, as well as challenges for expanding these uses in Eastham's key sites.

Key Findings

-) Eastham's economy is dominated by small local businesses, which is also common to the Outer Cape. A significant share of Eastham's businesses are home-based enterprises, which are scattered throughout the community. Eastham has a relatively high share of people who are self-employed, typically in fields related to fishing, construction/trades, property management, professional services, and the arts, many of which tend to be relatively higher-skilled and higher paying occupations.
-) Eastham's economy is also highly dependent upon tourism and seasonal residents. An analysis of retail spending confirms that Eastham currently functions as a dining and drinking destination. In terms of the market, there is potential, albeit limited, to expand commercial space related to retail and accommodations. Many businesses have physical room to expand, upgrade, or reposition their existing properties. Due to the seasonal market and other cost factors, it is difficult for the investment to be feasible without being able to increase the intensity of development.

-) There is a lack of quality retail oriented to full-time and seasonal residents. With competition from neighboring communities and a low year-round population density, the town's population makes it difficult to support national chains (exclusive of fast-food franchises). Any new retail will likely be occupied by independent, small scale and locally owned and operated stores. Retailers would be more likely to thrive in a walkable town center area, and with events and public realm improvements that highlight their visibility.
-) Eastham's "Blue Economy" includes fishing and shell-fishing, seafood wholesalers, natural resource research and advocacy, water-based recreation, and marine services. Infrastructure improvements and storage or operational space are needed to enable commercial fisheries and wholesalers to sustain or expand operations in Eastham. There is unmet demand for experience-based activities such as recreational boating, cycling, fitness classes, or youth camps.
-) There is low commercial vacancy and in fact, a lack of available commercial space or barriers to expanding building area are more frequent complaints from the local business community. Trade space, entrepreneurial flex and maker space, and shared office or retail space would serve the needs of Eastham businesses and entrepreneurs. The construction and operation of some types of shared facilities would likely require public sponsorship to be sustainable.
-) Workforce is a constraint for industries across the board. Cost of living, in particular housing and childcare, are major barriers to attracting employees. Increasing the supply of workforce housing is a high priority.

Section 1: Land Use Context

Like neighboring communities on the Outer Cape, Eastham is characterized as a rural, predominantly residential community. The town is bisected by Route 6, a major four-lane arterial roadway that runs the length of the Cape. The Cape Cod Rail Trail Bike Path extends from Dennis to Wellfleet, paralleling Route 6 through Eastham.

Most commercial development is concentrated along Route 6 in North Eastham, between Old Orchard Road and the Wellfleet town boundary. There are scattered commercial properties along the length of Route 6, with a small concentration near Town Hall toward the southern end of the town and at the intersection of Route 6 and Brackett Road. As noted above, there are also a substantial number of home-based businesses scattered throughout the community, as well as water-based commercial activities operating from Rock Harbor and several designated launch sites and aquaculture areas.

Infrastructure

All of Eastham is dependent on private wastewater and septic systems. Due to the sensitivity of Eastham's natural resources, environmental regulations are a limiting factor for development of both residential and commercial uses. A Zone 2 groundwater protection area covers most of the business area in North Eastham.

In 2015 the Town authorized design and construction of a \$130M public water supply system throughout Town. Previously all residential and commercial development in Eastham relied solely on private wells for their water supply needs, thereby constraining both the type and amount of development that could be built out. Completion of the Town water system has increased development potential and spurred new interest in development.

A fiberoptic network was launched in 2013 by nonprofit OpenCape, providing high speed internet access serving the Cape & Islands and Southeastern Massachusetts. Currently the open access network serves primarily institutions and government entities. For individual residents and businesses, the cost of connecting to the fiberoptic network is prohibitively expensive, especially at farther distances from the trunk which runs along Route 6.

Recent and Anticipated Development

Few larger scale residential developments have been constructed within the past decade or are anticipated to be developed in Eastham.

- J The Village at Nauset Green is a 65-unit rental community located on the Campbell-Purcell property in North Eastham, completed in 2020. The development includes workforce and affordable housing options, with one-, two-, and three-bedroom apartments.

-) A 20-unit townhouse development is undergoing permitting and preliminary site work. Cedar Banks Landing will provide market rate homes in the \$600,000 price range.

There are also three marijuana facilities in the permitting process, including Salty Farmers, which is a proposed 2,000 square foot cultivation and retail facility, as well as Emerald Grove, which will provide both a retail marijuana establishment and a medical marijuana dispensary.

Prior Studies

Eastham has undertaken considerable planning over the past fifteen years relating to land use, economic development, and zoning.

-) The North Eastham Village Center Strategic Report & Concept Plan (2007) provided a market analysis and concept plan for a village center in North Eastham focused on the Purcell property and other potential redevelopment sites. The study highlighted potential for the T-Time property to be redeveloped for mixed use including limited commercial, workforce housing, and senior housing.
-) The Comprehensive Plan (2010) articulated community goals and needs with respect to land use, growth management, natural resources, community facilities, economic development, and affordable housing.
-) The Urban Land Institute Technical Assistance Panel (TAP) Report (2017) provided an analysis of assets, challenges, development potential and economic feasibility for North Eastham given the recent availability of Town water.
-) The North Eastham District Local Technical Assistance (DLTA) Report (2018) built on the TAP report to offer recommended zoning changes to meet the Town's goal to facilitate cohesive, village-style development.
-) The Town of Eastham Strategic Plan (FY2020-2024) identified overarching principles, goals and strategies, focusing primarily on supporting a clean environment, well-designed development, quality of life, and transportation safety. The Strategic Plan also provided strategies and priorities relating to economic development.
-) The Town of Eastham Harbor & Waterways Management Plan (2020) provides an analysis of existing recreation and commercial activities on Eastham's waterfront, as well as the capacity and quality of the existing infrastructure to accommodate desired usage while protecting the natural environment.
-) A Route 6 Corridor Study is ongoing, aiming to identify potential improvements to safety and traffic circulation for Eastham residents and businesses.

Zoning

Based on the recommendations of the strategic planning described above, the Town has undertaken zoning initiatives to facilitate mixed use development and the establishment of a town center. The North Eastham Village Overlay District was adopted at Town Meeting in 2014. The intent of the overlay district was to encourage mixed-use development in the commercially-

zoned area. As of 2018 when the DLTA report was prepared, there had yet to be any new development that utilized the overlay district zoning.

In 2017 the North Eastham commercial area was designated a District of Critical Planning Concern (DCPC) under Section 10(a) of the Cape Cod Commission Act, and in 2018 the Town adopted regulations guiding development within the DCPC. These regulations provide for five commercial zoning districts:

-) Core Commercial (CC) promotes a compact vibrant commercial center with small setbacks from the street, small-scale commercial uses and accessory residential uses.
-) Transition Commercial (TC) allows small-scale commercial and residential uses, more modest setbacks on Route 6, and sharing of a single curb cut.
-) Office/Residential (OR) allows a mix of residential and compatible low-intensity commercial uses following traditional residential development patterns with no direct access to Route 6.
-) Limited Commercial (LC) allows for low-intensity commercial uses in a predominantly residential area with a shared Route 6 curb cut.
-) Trade Park (TP) focuses on industrial and trade uses.

T-Time Site

In 2019 the Town purchased the former T-Time golf driving range, an 11-acre parcel located in North Eastham on Route 6, bordering the Cape Cod Rail Trail. The location of site is just outside of the area that has been identified as the core of a potential village center in prior planning studies (2007 North Eastham Village Concept Plan and 2018 DLTA Report). It is currently zoned for Limited Commercial. (See Map 1.)



T-Time Property

The T-Time Development Committee was appointed for the purpose of evaluating potential uses of the site to identify the highest and best uses, and to develop a plan for the site that reflects the ideas and values of the community.

Map 1: Context



Prepared by Community Opportunities Group, Inc.

Source: MassGIS

Section 2: Socio-Economic Profile

This report primarily cites publicly-available data from the US Census, American Community Survey (ACS), State, and local sources, as well as proprietary data sources including Banker & Tradesman and ESRI. Varying levels of detail make each source valuable for comparing different aspects of the economy; however, as they employ substantially different methodologies there are differences in the results, for example the numbers of businesses or employees that are reported. The report also provides qualitative information obtained through interviews and focus groups with local professionals, business owners, government officials, and advocates who support economic development activities in the Town and region. Data for the Retail Gap Analysis is provided by ESRI.

Economic Profile

Demographics

Like many communities on Cape Cod, particularly among the outer Cape towns, Eastham has high seasonal variability in population. By ACS estimates, over 60 percent of Eastham's housing units are seasonally occupied, compared with 38 percent throughout all of Barnstable County. Consistent with this estimate, 60 percent of residential property owners in Eastham's Assessor's database list a primary address outside of Eastham. The Market Analysis will consider the town's year-round population, as well as available data to characterize the part time or seasonal population and visitors or tourists.

Year-round population peaked in 2000 and fell by 22 percent between 2000 and 2010, but appears to have leveled off in the past ten years. The Donohue Institute projected continued decline by 9 percent between 2010 and 2020, but the 2019 ACS estimated only a 1 percent decline over this period.

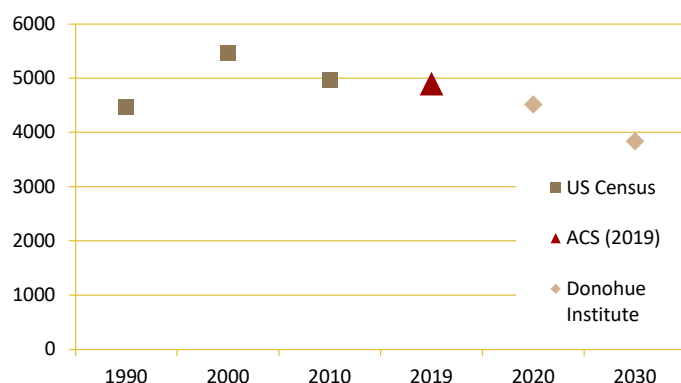
Figure 2 shows historic and projected population trends by age cohort. While the total population remained stable between 2010 and 2019, the share of older adults increased while the share of young adults and school-aged children declined. The shift in age profile is expected to continue over the coming decade. However, as of 2019 the loss of school-aged

Table 1:

Housing Units	Eastham		Barnstable County	
Owner Occupied	2,173	35%	74,410	46%
Renter Occupied	223	4%	20,007	12%
Seasonally Occupied	3,818	61%	60,531	38%
Other Vacant	75	1%	6,363	4%
Total Units	6,289	100%	161,311	100%

Source: ACS 2015-2019

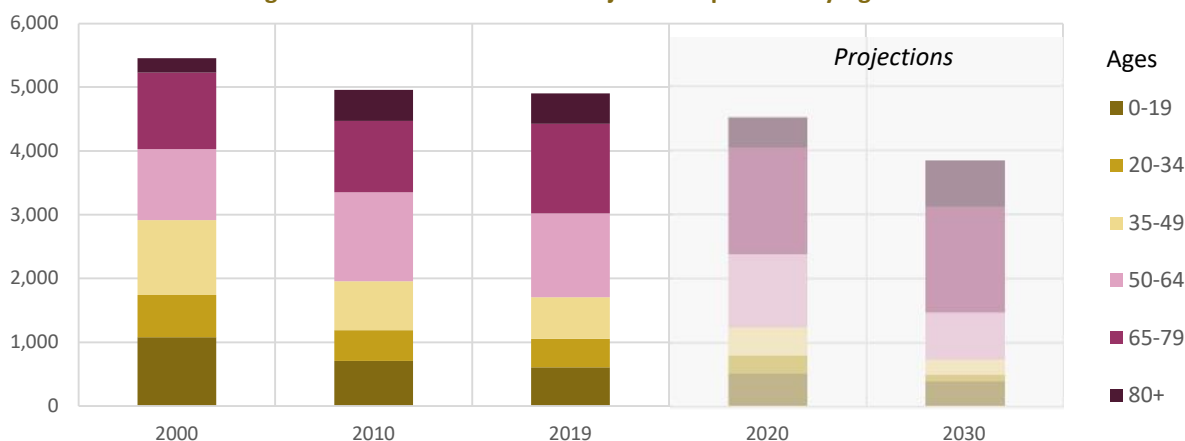
Figure 1: Population Projections for Eastham



Source: US Census, ACS (2019), Donohue Institute

children and younger adults has not been as pronounced as was projected for 2020.

Figure 2: Eastham Historic & Projected Population by Age Cohort



Source: US Census, ACS (2019), Donahue Institute

Local sources reflect ACS data. According to the Town Census, Eastham's population declined by about 200 people between 2014 and 2018 but has been rising in the past couple of years, even before the change in dynamics brought on by the COVID-19 pandemic. School enrollment in Eastham Elementary School declined between 2010 and 2015 but has increased or held steady through the past five years. Overall enrollment in the regional high school (which includes Eastham, Brewster, Orleans, and Wellfleet) declined steadily between 2010 and 2020.

Figure 3: Town Census Population

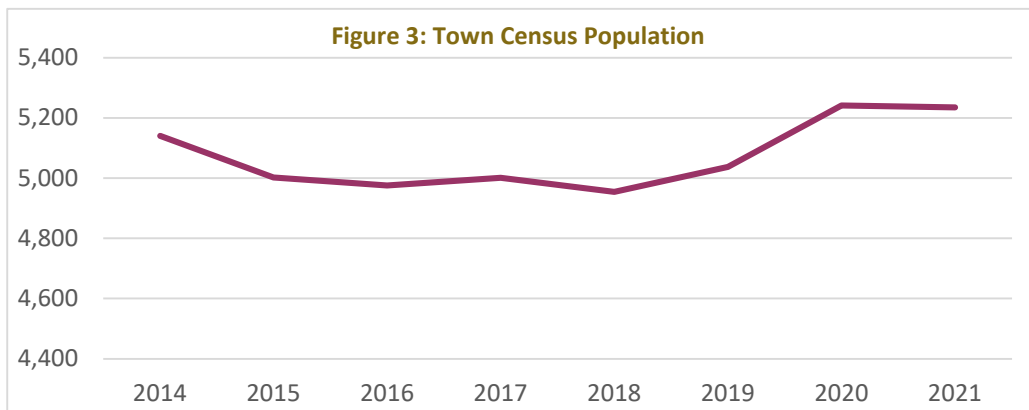


Table 2: School Enrollment

	2009/2010	2014/2015	2019/2020	2020/2021
Eastham Elementary (Pk-5)	225	182	194	194
Nauset Regional High (6-12)	1,535	1,515	1,480	1,426

Source: Massachusetts Department of Elementary and Secondary Education

Households living in Eastham tend to be smaller and have a different age composition than statewide or Barnstable County as a whole. Although a similar proportion are families, fewer households have children under age 18, while a substantially higher proportion include seniors

over age 60. Nonfamily households include individuals living alone, unmarried partners, roommates, or other nonfamilial living situations. The share of individuals living alone is comparable to the state and county, but a higher proportion are seniors over the age of 65, reflecting a disproportionately older population overall, as shown in Table 3. The proportion of households with children has increased since 2010, as has the share of households with seniors. (In most cases these changes in household characteristics are within the margin of error for the ACS sample methodology.)

Table 3: Household Composition

	Average Household Size	Families	Nonfamily Households	Individuals Living Alone	Seniors 65+ Living alone	With Children under 18	With Seniors over 60
Eastham (2010)	2.03	63%	37%	32%	18%	10%	64%
Eastham (2019)	2.05	64%	36%	29%	22%	15%	67%
Barnstable County	2.23	63%	37%	31%	18%	20%	59%
Massachusetts	2.52	63%	37%	29%	12%	29%	40%

Source: ACS Five-Year Estimates 2006-2010, 2015-2019

Table 4: Social Characteristics

	Eastham	Barnstable County	MA
Race/Ethnicity			
White, not Hispanic	91.5%	89.3%	71.6%
Asian	3.1%	1.5%	6.6%
Black	1.7%	2.9%	6.9%
Other	2.9%	3.3%	3.0%
Hispanic/Latino (any race)	0.9%	3.1%	11.8%
Immigration/Language			
Born in US	92.5%	93.0%	84.7%
Foreign born	7.5%	7.0%	15.3%
Limited English-Speaking	NA	1.4%	6.0%
Educational Attainment			
High School Graduate or Higher	97.9%	95.5%	90.8%
Bachelor's Degree or Higher	50.6%	43.4%	43.7%

Source: ACS 2013-2017 (NA = Not Available)

Eastham's population is overwhelmingly White. Residents who identify as other races or Hispanic/Latino comprise less than 10 percent of the Town's population, and less than 10 percent of Eastham residents immigrated from someplace outside of the United States.

Eastham has a highly educated workforce. Eastham residents are more likely to have completed high school or to

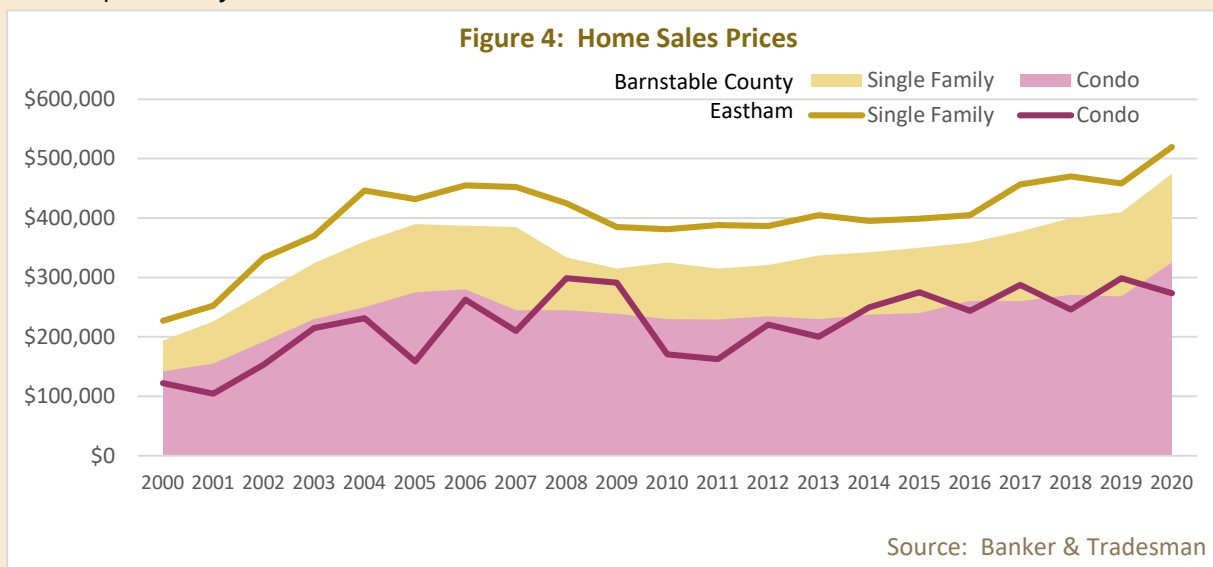
have attained a college degree than the state or Barnstable County. On the whole, most residents of Barnstable County have obtained at least a high school diploma.

Part Time/Seasonal/Visitor Population

Limited data is available to capture seasonal fluctuations in population. Recent studies have estimated Eastham's summertime population at 20,000 to 25,000.¹ This includes year-round residents, seasonal or part-time residents, and tourists.

Housing Market Highlights

-) By ACS estimates, about 35 percent of housing units are occupied by homeowners year round, while 4 percent are occupied by renters. Renter housing comprises 9 percent of all year-round occupied housing, while 91 percent are owner-occupied.
-) Throughout Barnstable County, 58 percent of housing units are occupied year round, of which 21 percent are renter-occupied and 79 percent are owner-occupied.
-) The majority (95 percent) of Eastham's housing are single family homes; only 5 percent of housing is in multifamily structures with 2 or more units.
-) Home prices in Eastham have increased by 30 percent in the past five years; the median sales price for single family homes was \$520,000 in 2020.
-) By many observations, demand for home sales in Eastham rose dramatically in 2020. Banker & Tradesman reported 194 single family homes sold in 2020, while the number of homes sold in the previous five years hovered around 150 homes per year. According to local MLS data, 20 percent of homes in Eastham sold over list price in 2020, compared with 7 percent in 2019.
-) Condos are much less expensive, with a median sales price of \$273,000 in 2020, However, condos are also less available, with an average of 16 sold per year over the past five years.



¹ North Eastham Village District study, 2007; Town of Eastham Harbor & Waterways Management Plan, 2020; and Town of Eastham Strategic Plan, 2019

As shown previously in Table 1, over 60 percent of Eastham's housing is seasonally occupied. Some are second homes whose owners live in Eastham for part of the year and in a different locale the remainder of the year. Many second homeowners rent out their properties to visitors while they are not in use. There are also many seasonally-occupied homes that are exclusively rented.

COVID-19 had a profound impact on seasonal home occupancy throughout the Cape. Many second homeowners relocated to their Eastham homes to access more outdoor space and natural environment, while there was an unprecedented ability to work remotely. It is impossible to anticipate how many households who relocated to Eastham to stay in the off-season during the pandemic will remain in town after this year. There will likely be some influx of working-age residents living full time in town, bringing jobs with them that can be done remotely. The Cape Cod Commission plans to conduct a homeowner's survey in 2021 to better understand the potential increase in the region's population from people who migrated to Cape Cod in 2020, and whether the impacts are short term or can be anticipated to continue for the long term.²

Income and Employment

Eastham's median household income is slightly below the median for Barnstable County and the state. Eastham, along with other communities on the Cape, has experienced a slightly lower rate of income growth over the past 10 years than the state overall. There is significant income disparity among different types of households; the median for Eastham families is \$88,950, compared with \$38,798 for nonfamilies (a large portion of whom are seniors living alone).

Table 5: Median Household Incomes

	Median Income All Households	Median Family Income	Median Nonfamily Income	Change in Household Income since 2010
Eastham	\$72,075	\$88,950	\$38,798	23%
Barnstable County	\$74,336	\$93,335	\$44,840	23%
Massachusetts	\$81,215	\$103,126	\$46,467	26%

Source: ACS 2015-2019

There is also income disparity by age of household. Eastham has few households headed by young adults (under age 24) hence income data is not available

Table 6: Household Income by Age of Householder

	Eastham			Barnstable County	
	Households	%	Median Income	Households	Median Income
15 to 24 years	50	2%	-	1%	\$50,893
25 to 44 years	276	12%	\$95,305	18%	\$78,666
45 to 64 years	822	34%	\$69,531	39%	\$89,457
65 years & over	1,248	52%	\$71,926	43%	\$63,109

Source: ACS 2015-2019

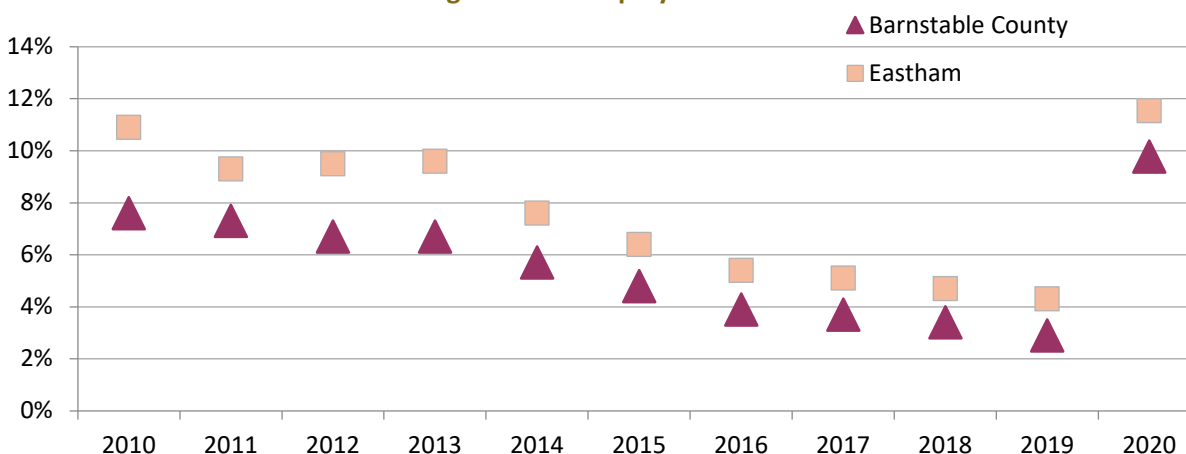
on the Town level. Across Barnstable County this group has the lowest median household income. Middle aged households typically have higher incomes, as is true for Barnstable County.

² "Mass Exodus," Cape & Plymouth Business Magazine (March 2021)

In Eastham, households headed by seniors (comprising over half of Eastham's households) have incomes comparable to working age adults in the 45-64 cohort.

Due to having a larger concentration of residents who are of retirement age, Eastham has a relatively low workforce participation rate. Half (50 percent) of percent of Eastham's population over age 16 are in the workforce compared with 67 percent statewide, or 60 percent for Barnstable County. This includes residents who are employed or report themselves to be unemployed and seeking employment.

Figure 5: Unemployment Rates



Source: MA Executive Office of Workforce & Labor Development (EOWLD)

Eastham has historically had higher rates of unemployment than the rest of Barnstable County, however, unemployment rates for Eastham had declined from a peak of 10.9 percent in 2010 to a low point of 3.0 percent in March of 2020, after which the pandemic caused an abrupt disruption of the economy throughout the region and across the country. The monthly average throughout all of 2020 was 12 percent, with the rate of unemployment reaching a height of 17.8 percent in June of 2020.

Table 7: Occupations of Residents in the Region (2011)

	Eastham	Barnstable County
Labor Force	2,146	105,715
Business, science, management, & arts	41%	38%
Natural resources, construction, and maintenance	10%	11%
Production, transportation, and material moving	7%	8%
Sales and office	23%	22%
Service	18%	21%

Source: ACS 2015-2019

According to ACS, the largest share of Eastham residents, 41 percent, work in business, science, management, and arts occupations, exceeding the share for Barnstable County. About 10 percent of Eastham residents work in natural resources, construction, and maintenance occupations.

By industry of employment (shown in Table 8), the largest share of Eastham residents are employed in industries that may

be related to tourism, including retail, restaurants & hospitality, arts, entertainment, and recreation. This is a higher concentration than workers throughout Barnstable County. The next largest sources of employment are in education, health care and social services, as well as professional, scientific, and administrative fields.

Table 8: Industry of Employment for Eastham Workforce*

Major Industries	Eastham	Barnstable County
Total Employees	2,146	105,715
Agriculture forestry fishing hunting mining	3%	1%
Construction & Manufacturing	8%	14%
Retail, Restaurants & Hospitality, Arts, Entertainment & Recreation	32%	25%
Professional scientific management administrative waste service information	14%	14%
Finance & Insurance, Real Estate & Leasing, Professional & Technical Services, Management & Admin	8%	6%
Education, Health Care & Social Services	21%	24%
Wholesale trade, Transportation & Warehousing, Information, Other Services	3%	6%
Other services	6%	5%
Public Administration	5%	5%
<p>* Note: Data describes the primary employment self-reported to ACS by a sample of Eastham residents. Respondents may not report informal or secondary sources of income.</p> <p>Source: ACS 2015-2019</p>		

A relatively large share of Eastham residents are self-employed, particularly in occupations related to construction, maintenance, and natural resources (i.e., fishing, shellfishing agriculture, or mining/extraction), and arts and professional occupations. Compared to the state or county, Eastham residents are less likely to be employed in private nonprofit organizations or to be employees of private companies. ACS (2019) estimated 407 Eastham residents earned self-employment income (17 percent of the workforce).

Table 9: Occupation by Class of Worker

	Eastham Workers	Employee of private company	Self-employed in own incorporated business	Private Not for Profit	Local, state & federal government	Self-employed in own not incorporated business
Management, business, science, and arts	888	39.8	9.8	12.4	23	15.1
Natural resources, construction, and maintenance	223	47.5	5.4	0.0	3.6	43.5
Production, transportation, and material moving	149	100.0	0.0	0.0	0.0	0.0
Sales & office	500	72.4	8.4	3.4	10.4	5.4
Service	386	68.7	0.0	4.4	13.0	14.0
Eastham Total	2,146	57.5	6.6	6.7	14.6	14.5
Barnstable County Total		59.7	5.7	10.6	12.2	11.9
State Total		66.3	2.9	12.9	12.1	5.9

Source: ACS 2015-2019

Table 10: Mean Travel Time to Work (2019)

Geography	Minutes
Provincetown	19.1
Truro	19.3
Wellfleet	23.8
Eastham	26.7
Orleans	22.6
Brewster	22.3
Harwich	19.5
Dennis	24.4
Barnstable County	23.9

Source: ACS 2015-2019

Not surprisingly given the town's geographic location and the economy of the outer Cape, Eastham residents travel farther on average to get to work than residents of neighboring communities.

Table 11 shows the top communities in which Eastham residents work, as well as the communities in which people who work in Eastham live. The largest share of Eastham residents have jobs located in Orleans or other communities in the Mid to Outer Cape. About 14 percent of Eastham residents are employed in Eastham, while 25 percent of Eastham jobs are held by Eastham residents.

Table 11: Journey to Work

Where Eastham Residents Work	Number	Where Eastham Workers Live:	Number
Orleans	15%	Eastham	25%
Eastham	14%	Brewster	11%
Barnstable	7%	Harwich	10%
Wellfleet	6%	Orleans	10%
Boston	5%	Yarmouth	8%
Provincetown	5%	Barnstable	6%
Brewster	4%	Wellfleet	4%
Harwich	3%	Dennis	3%
Chatham	3%	Chatham	2%
Dennis	3%	Sandwich	1%
All other locations	36%	All other locations	19%
Total	100%	Total	100%

Source: US Census On The Map 2018

Economic Base

Eastham is a predominantly residential community, with a small economic base relative to the size of its workforce. As shown in Table 12, there are 0.41 jobs per resident member of the labor force. Among nearby communities, Orleans is an employment center, hosting 1.39 jobs per resident member of the workforce.

Table 12: Jobs to Labor Force Ratio

Geography	Labor Force 12/20	Jobs 1st Quarter 2020	Jobs: Labor Force Ratio
Provincetown	2,027	1,729	0.85
Truro	1,198	458	0.38
Wellfleet	1,617	785	0.49
Eastham	2,428	1,004	0.41
Orleans	2,648	3,689	1.39
Brewster	4,739	2,237	0.47
Harwich	5,690	3,454	0.61
Dennis	6,171	4,113	0.67
Barnstable County	104,041	85,907	0.83

Source: MA Executive Office of Labor and Workforce Development (EOLWD). December 2020

The following tables show the number of establishments, employment, and average weekly wages for Eastham and Barnstable County. Employment and Wage data are derived from reports filed by all employers subject to unemployment compensation laws, which excludes some small businesses or self-employed workers. Data is not published for industries in which the small number of businesses would compromise confidentiality. Among businesses that are reflected in this data, the largest industry in Eastham in terms of both the number of establishments and the total number of jobs they provide is construction, closely followed by accommodation and food services. Retail trade and education, health care, and social services also form a significant part of the town's economic base.

A community's **Location Quotient**³ (LQ) is a ratio of the concentration of jobs in the community compared with the larger region of which it is a part. Table 13 shows the LQs for Eastham compared with Barnstable County and with the state. A larger share of jobs in accommodation, food services, arts, entertainment, and recreation reflect the importance of the tourism economy. The Town also has a high concentration of jobs in construction compared to the state, which combined with a relatively high share of jobs in administrative and waste services, underscores the prominence of building trades and property maintenance as economic drivers in Eastham. Finally, a relatively strong presence of wholesale trade and transportation and warehousing are primarily related to businesses that support the blue economy (commercial and

³ Words **highlighted in pink** throughout the report are defined in Appendix 1.

sport fishing and other marine-related enterprises) and other commercial activity in Eastham and the surrounding region.

Table 13: Employment and Average Weekly Wage by Industry * (2019)

Industry	Eastham			Barnstable County % Empl.	Town to County LQ	Town to State LQ
	Establish-ments	# of Empl.	% Empl.			
Goods-Producing	49	276	22%	10%	2.23	1.84
Construction	43	265	21%	7%	2.92	4.34
Natural Resources and Mining	Not Available			0%		
Manufacturing	Not Available			2%		
Service-Providing	147	994	78%	90%	0.87	0.89
Wholesale Trade	5	39	3%	2%	1.87	0.90
Retail Trade	21	123	10%	16%	0.62	1.00
Transportation & Warehousing	6	49	4%	3%	1.49	1.23
Finance & Insurance	3	21	2%	2%	0.70	0.35
Real Estate, Rental & Leasing	6	18	1%	1%	0.98	1.06
Professional & Technical Services	19	42	3%	5%	0.68	0.34
Administrative & Waste Services	17	68	5%	4%	1.23	1.03
Education, Health Care & Social	14	152	12%	25%	0.48	0.43
Arts, Entertainment & Recreation	6	77	6%	4%	1.55	3.18
Accommodation & Food Services	31	241	19%	17%	1.14	2.18
Other Services	10	54	4%	4%	1.10	1.26
Total/Average	196	1,270				
<p>* Note: Employment and Wage data are derived from reports filed by employers subject to unemployment compensation laws, which excludes some small businesses or self-employed workers.</p> <p>Rows highlighted in red denote industries for which Eastham has a relatively high concentration.</p> <p style="text-align: right;">Source: MA EOLWD, ES202</p>						

Shown in Table 14, average wages are lower in Eastham than across all of Barnstable County in almost every industry with the exception of accommodation and food service and other services, where Eastham employers pay slightly above average for the County. Eastham has a concentration of lower wage jobs; about 58 percent of Eastham's jobs are in industries whose average wages are below \$50,000 per year. Higher paying jobs include construction, wholesale, finance & insurance, and professional & technical assistance.

Table 14: Employment and Average Weekly Wage by Industry (2019)

Industry	Eastham				Barnstable County Average Annual Wages
	Establish- ments	# of Empl.	% Empl.	Average Annual Wages*	
Goods-Producing	49	276	22%	\$57,304	\$63,700
Construction	43	265	21%	\$58,084	\$63,492
Natural Resources and Mining	Not Available				\$53,508
Manufacturing	Not Available				\$65,780
Service-Providing	147	994	78%	\$40,768	\$48,516
Wholesale Trade	5	39	3%	\$54,236	\$67,600
Retail Trade	21	123	10%	\$28,704	\$34,632
Transportation & Warehousing	6	49	4%	\$52,052	\$49,556
Finance & Insurance	3	21	2%	\$72,904	\$96,876
Real Estate, Rental & Leasing	6	18	1%	\$36,920	\$44,512
Professional & Technical Services	19	42	3%	\$67,236	\$74,828
Administrative & Waste Services	17	68	5%	\$45,292	\$47,996
Education, Health Care & Social	14	152	12%	\$35,828	\$56,628
Arts, Entertainment & Recreation	6	77	6%	\$23,816	\$33,020
Accommodation & Food Services	31	241	19%	\$29,640	\$28,756
Other Services	10	54	4%	\$41,184	\$39,988
Total/Average	196	1,270		\$44,356	\$50,024

* Note: Average wage derived from annualized Average Weekly Wages
 Rows highlighted in red denote industries in which the average annual wage for Eastham-based jobs is greater than \$50,000 per year.

Source: MA EOLWD, ES202

While still relatively low, wages have grown faster in Eastham over the past five years compared with Barnstable County and the state.

Table 15: Average Annual Wage

	Eastham	Barnstable County	Massachusetts
2014 Total All Industries	\$35,516	\$42,588	\$64,116
2019 Total All Industries	\$44,356	\$50,024	\$75,504
Change 2000-2010	25%	17%	18%

Source: MA EOWLD, 2019, 2014

While state data allows for comparison of industry concentration and wages, local data provides a clearer picture of the business community in town, as many small businesses are not captured in the above data set. (This list is still not comprehensive, as many self-employed individuals may be engaged in the economy without being registered as businesses.) As of January 2021, there are 325 businesses registered in the Town of Eastham.⁴

⁴ Town of Eastham Business Registration Database, December 2020

) By far, the largest share of Eastham-based businesses are related to construction and maintenance of homes and properties, comprising 37 percent, combined. These include building trades, repair and home improvement, landscaping, cleaning, waste management, etc., and are predominantly home-based. Also somewhat related are real estate and property management businesses, which constitute another 6 percent.

) The second largest cluster is related to the tourism economy. These include accommodations, restaurants, retail, and recreation, which combined make up about one quarter of registered businesses. These businesses are less likely to be home-based.

) A third significant cluster is arts/creative and professional services, which are predominantly home-based enterprises. These include artists, designers and performers, as well as consultants, accountants, lawyers, and other types of professional specializations.

) There are 12 registered businesses (4 percent) specifically related to the town's marine resources including commercial fishing, rental or charter boats, and boat building and repair. Some businesses that are identified as retail, food service, or recreation are also directly engaged with fishing and water resource-based activities.

There are 122 commercial properties listed in Eastham's Assessor's Database with a total of 530,000 square feet of space. The largest share of commercial property is classified as "mixed use", having a combination of residential and some form of commercial use. Of stand-alone commercial uses, motels comprise the largest share in terms of land area, building area, and property valuation. Eleven properties classified as motels have an average of 12,000 square feet of building area. Most other types of commercial spaces are fairly small; retail, restaurant, auto uses, and commercial/industrial flex space buildings classified as "storage" average 3,000 to 4,500 square feet of building area.

Table 16, Registered Businesses in Eastham

Row Labels	Grand Total	% of total	% home based
Home/property services	78	24%	71%
Building/Construction	41	13%	83%
Accommodations	33	10%	64%
Arts/Creative	28	9%	86%
Restaurant/Food service	25	8%	8%
Retail	20	6%	30%
Real Estate/Property Management	18	6%	28%
Professional service	18	6%	83%
Fishing/Marine	12	4%	67%
Auto	11	3%	36%
Personal care	10	3%	30%
Recreation	10	3%	30%
Grocery/Liquor	8	2%	0%
Healthcare	5	2%	40%
Industrial	3	1%	0%
Other Service	3	1%	33%
Agriculture	1	0%	100%
Nonprofit/Institutional	1	0%	0%
Grand Total	325	100%	57%
Source: Town of Eastham Registered Businesses List, 12/17/2020			

Table 17: Commercial Space

	Properties	Total Acres	Total Valuation	Total Building Area square feet	Average Building Area	Average value per acre	Average value per sf
Auto	5	4.3	\$ 3,167,600	18,912	3,782	\$757,164	\$69
Fitness	1	9.6	\$ 3,155,800	87,754	87,754	\$328,695	\$10
Mining	2	36.1	\$751,300	200	100	\$24,715	N/A
Mixed	60	151.3	\$50,285,800	143,554	2,393	\$650,107	\$213
Motel	11	35.3	\$17,741,500	131,816	11,983	\$568,230	\$297
Office	12	6.3	\$ 4,516,100	22,212	1,851	N/A	\$103
Restaurant	8	10.9	\$5,427,900	33,671	4,209	\$567,979	\$83
Retail	9	12.7	\$5,183,000	27,577	3,064	\$541,933	\$106
Storage	14	11.2	\$ 5,658,800	63,937	4,567	\$510,090	\$41
Total	122	277.7	\$95,887,800	529,633	4,341	\$345,359	\$181

Source: Eastham Assessor's Database, FY 22

As noted in the DLTA Report, the majority of commercial structures are modest sized and older. Mostly built before 1990, most commercial structures are nearing the end of their useful life of 20-30 years. The average footprint of commercial buildings in Eastham is less than 5,000 square feet. There are also numerous parcels that could support additional commercial development under current zoning.⁵ In a field analysis for this study very little vacancy was observed in commercial buildings.

Retail Gap Analysis

A Retail Gap Analysis examines **retail leakage** (gaps in current retail market), and retail business potential. The study provides a foundation of data to better understand the town's retail industry and identify potential retail needs and opportunities. The leakage analysis compares resident spending to local and regional retail business sales to identify specific retail categories in which residents are leaving the area to spend money (resulting in a retail leakage), or alternatively, where people from outside of the area are coming to shop at local businesses (creating a retail surplus). The retail potential analysis examines the number of retail businesses in those categories with leakage that may be able to be supported in Eastham if some of the retail spending is recaptured along with spending from tourists.

This analysis utilizes data from ESRI Business Analyst – a leading provider of demographic and business data. ESRI uses publicly accessible data along with proprietary statistical models to generate estimates for present day (2020). It should be noted because ESRI provides estimates, the data is not considered to be 100% accurate.

⁵ North Eastham District Local Technical Assistance (DLTA) Report, 2018

The analysis considers consumer spending and supply and demand for 27 spending categories. The categories are based upon the North American Industry Classification System (NAICS) codes which classify businesses by their primary type of economic activity. The BLS (Bureau of Labor Statistics) began using NAICS in 1997 in lieu of Standard Industrial Codes (SIC's). The categories used in this study are based upon 3- and 4-digit NAICS codes. It should be noted that many retailers fall under multiple categories but are given the NAICS code that describes their primary economic activity. For this analysis, automobile dealerships, gasoline stations, department stores and grocery stores were not considered appropriate or desirable for Eastham and therefore were not discussed in detail. A detailed description of the **retail categories** and examples of business in each of these categories is included in Appendix 1.

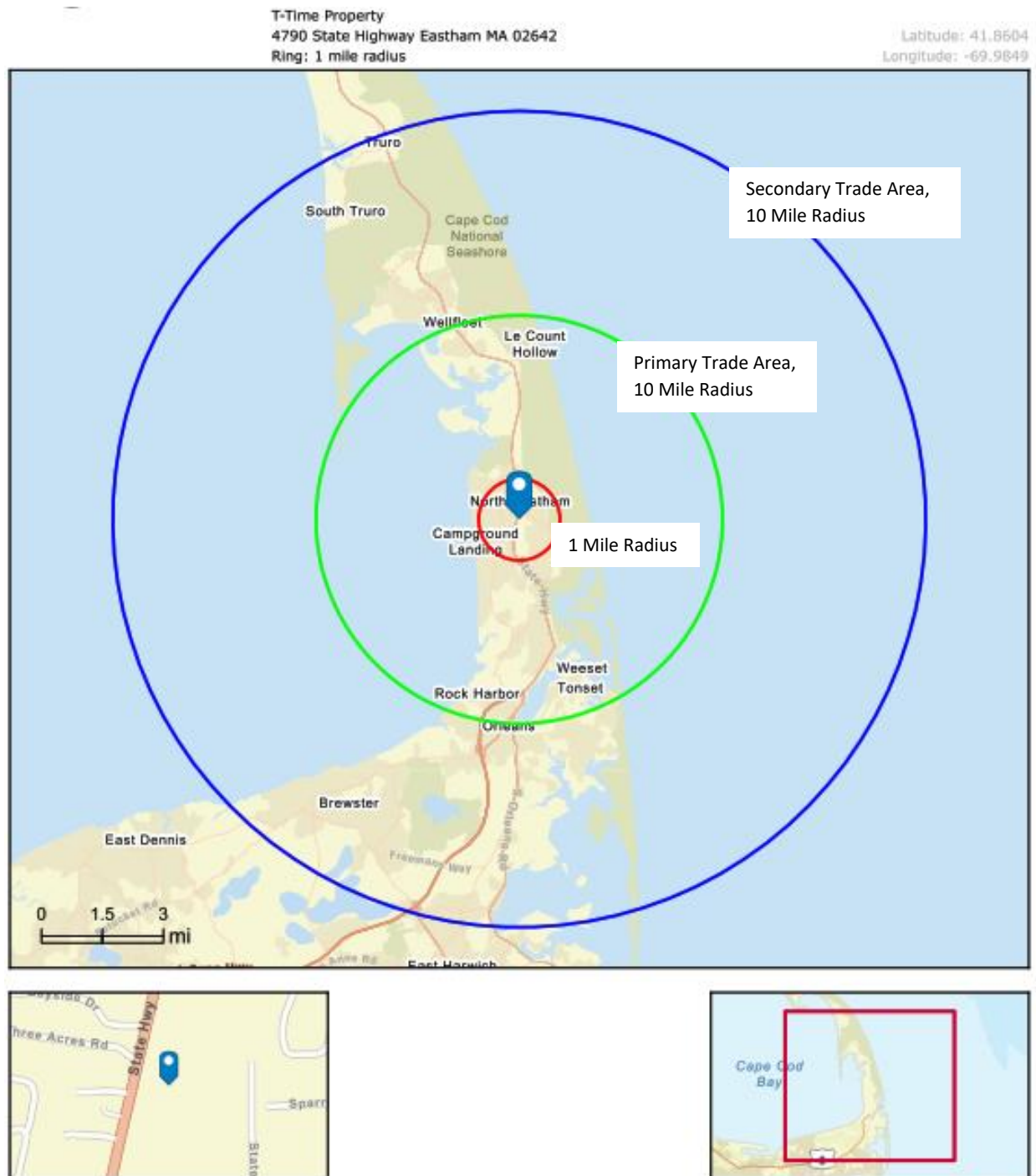
Geographies Used in Analysis

Three geographies were selected for analysis to examine specific retail concentrations. The geographies in the analysis include the Town of Eastham and two trade areas defined by a five-mile and ten-mile radius from the T-Time Property (4790 State Highway Route 6).

These are discussed below and shown on the map on the following page.

-)] Town of Eastham: The town's boundaries form this area of analysis.
-)] Primary Trade Area: The primary trade area (PTA) is defined as the area in which approximately 80% - 85% of the customers of a given retail outlet reside. The PTA is determined by a variety of factors including drive times, walking distances, natural or manmade barriers such as rivers and highways and distance to other retail facilities. In general, for convenience shopping one should be able to drive to the site in no more than ten minutes. However, one must also take into consideration the proximity of other retail facilities. For example, residents that live in the southern edge of the trade area may find it more convenient to shop in Orleans and residents of the northern edge of the trade area may find it more convenient to shop in Provincetown. For the purposes of this analysis, the primary trade area (PTA) has been defined as a five-mile radius which includes the entire town of Eastham and extends to Orleans to the south and Wellfleet to the north. The PTA is a relatively small area given the proximity of retail facilities in Orleans and Provincetown and the limited roadway network.
-)] Secondary Trade Area: The Secondary Trade Area is defined as the area in which approximately 10-15% of the customers of a given retail outlet reside. For this analysis, the secondary trade area has been defined as a ten-mile radius which includes the towns of Truro and Brewster.

Map 2: Trade Area



Consumer Characteristics

This section examines the key sociodemographic characteristics of the consumer households within each trade area. It also examines consumer spending patterns and behaviors and identifies the major consumer segments to help understand the retail potential in Eastham.

Demographic data can be particularly useful in the development of a retail strategy due to the well-defined customer bases that some retailers have identified. This section will document the demographic findings for the town of Eastham and the Primary Trade area.

Table 18 summarizes the demographic and income trends discussed in the section above. Figures are shown for the Primary Trade Area, Secondary Trade Area and the Town of Eastham.

Table 18, Trade Area Demographics			
	Primary Trade Area	Secondary Trade Area	Eastham
Population	8,591	24,825	5,377
Number of Households	4,121	11,770	2,577
Median Disposal Income	\$51,915	\$53,843	\$53,632
Per Capita Income	\$44,784	\$47,636	\$45,414
Median Age	59.9	58.7	59.8
Source: ESRI			

Retail Leakage Analysis

A retail leakage analysis is a statistical tool to help understand the retail dynamics in a certain geography. It is commonly referred to as a retail “gap” analysis because it identifies gaps in the retail market where demand for retail goods and services in a specific category is not being satisfied by the existing retail businesses in that geography (i.e., sales are leaking out of the geography).⁶ Supply (retail sales) estimates sales to consumers by establishments.⁷ Demand (retail potential) estimates the expected amount spent by consumers at retail establishments.

The analysis compares the estimated spending of households located in a given geography (demand) with actual sales at retail businesses within that same geography (supply). “Estimated spending,” or demand, is a figure that includes all retail spending by households, including at local retail establishments as well as elsewhere in the region and online. Actual sales at retail businesses within the geography include all sales, whether to local residents or not, thus indicating the total supply provided to all customers. Retail leakage (gap) is calculated as demand minus supply. Therefore, a **positive retail gap** indicates that demand exceeds supply

⁶ The data used is for 2017 from Infogroup, Inc. Supply and demand estimates are in current dollars. ESRI uses the North American Industry Classification System (NAICS) to classify businesses by their primary type of economic activity.

⁷ Sales to businesses are excluded, although many businesses responded in the Survey that they do business with other local establishments, whenever possible. Some business-to-business sales, such as independent contractors patronizing the Eastham Ace Hardware Store, are likely captured in the consumer sales estimates.

within the geography, and consumers are leaving the area (or going online) to purchase goods and services in that category. It may be possible to recapture some of that spending in a given geography, and this is discussed further in the following section. A **negative retail gap** indicates a net inflow of spending in a retail category within a given geography. Therefore, a negative retail gap indicates that supply exceeds demand from within the geography, indicating that customers are coming from outside the geography. This is common when there is a significant retail destination that attracts shoppers from outside of the geography being examined. The negative gap is the amount of money that residents from outside the community spend in that geography. The retail leakage analysis was performed for each of the geographies. A summary of the retail leakage analysis is provided below. A more detailed breakdown by category for each geography is provided as well.

Summary

The Town of Eastham has a net overall retail leakage of \$59 million annually. Much of this leakage is being captured by businesses just outside of town. The leakage represents the amount of retail spending by town residents that occurs at businesses outside of town (or online). That \$59 million figure amounts to 50% of all Eastham's residents' retail spending. (Total retail spending by Eastham town residents is estimated to be \$117 million annually). It should be noted that despite an overall positive retail gap, Eastham has a negative gap in the food and drink category.

In both the primary and secondary trade area, there is a significant negative retail gap in both retail trade and food and drink. This suggests that the market derives a significant portion of its sales from those residing outside of these areas, whether from residents from other towns on the Cape or from tourists.

The retail picture for the Primary Trade Area is different from that of the Town of Eastham. While Eastham has a net overall leakage of \$59 million, the Primary Trade area has a negative retail gap of -\$48 million. The total retail spending by residents of the trade area is estimated to be \$190 million and the retail supply is \$239 million. The Secondary Trade Area is similar to the Primary Trade Area in that the total retail spending of residents is estimated to be \$538 million and total retail sales in excess of \$656 million resulting in a negative retail gap of -\$118 million. For both the Primary and Secondary Trade areas, the largest negative gap is in the food and drink category.

Note that the Leakage/Surplus Factor represents a snapshot of retail opportunity. This is a measure of the relationship between supply and demand. A positive value represents leakage of retail opportunity outside of the defined area. A negative value represents a surplus of retail sales, a market where customers are drawn in from outside the area. Tables 19, 20, and 21 provide a summary of the Retail Gap in the three geographies.

Table 19: Retail Gap Summary- Eastham

	Demand	Supply	Retail Gap	Leakage/Surplus Factor
Total Retail Trade and Food & Drink	\$117,388,326	\$58,036,081	\$59,352.245	33.8
Total Retail Trade	\$107,392,370	\$40,493,597	\$66,898,773	45.2
Total Food & Drink	\$9,995,956	\$17,542,484	-\$7,546,528	-27.4
Source: ESRI Business Analyst				

Table 20: Retail Gap Summary- Primary Trade Area

	Demand	Supply	Retail Gap	Leakage/Surplus Factor
Total Retail Trade and Food & Drink	\$190,366,392	\$238,967,671	-\$48,601,279	-11.3
Total Retail Trade	\$174,005,449	\$188,964,226	-\$14,958,777	-4.1
Total Food & Drink	\$16,360,942	\$50,003,445	-\$33,642,503	-50.7
Source: ESRI Business Analyst				

Table 21: Retail Gap Summary- Secondary Trade Area

	Demand	Supply	Retail Gap	Leakage/Surplus Factor
Total Retail Trade and Food & Drink	\$538,296,297	\$656,155,820	-\$117,859,523	-9.9
Total Retail Trade	\$490,634,923	\$530,850,709	-\$40,215,786	-3.9
Total Food & Drink	\$47,661,374	\$125,305,111	-\$77,643,737	-44.9
Source: ESRI Business Analyst				

Town of Eastham

The Town is experiencing retail leakage in many sectors. The retail sectors with the great amounts of leakage (at the 4-digit NAICS level) are:

-) Automobile Dealers (\$17M)
-) Department Stores (\$8.3M)
-) Grocery Stores (\$6.8M)
-) Health & Personal Care Stores (\$7.5M)
-) Clothing Stores (\$3.7M)
-) Building Material & Supplies Dealers (\$5.5M)
-) Home Furnishings Stores (\$2.6M)
-) Electronics & Appliance Stores (2.3M)
-) Auto Parts & Tire Stores (\$1.7 M)
-) Jewelry, Luggage & Leather Stores (\$1M)

The leakage in Health & Personal Care Stores is notable because Health & Personal Care stores are considered “convenience” retail in that consumers will typically only drive short distances for these stores whereas people are generally willing to drive further for “destination” retail establishments such as Automobile Dealerships and Department stores.

Some of the “destination” categories that consumers are willing to drive longer distances for may not be appropriate for Eastham.

The Town does have some notable retail sectors with a negative retail gap (i.e., representing a net influx of spending). The most significant of these include:

-) Restaurants/ Eating Places (-\$5.9M)
-) Beer, Wine & Liquor Stores (-4.60M)
-) Special Food Services (-\$2M)
-) Lawn & Garden Equipment & Supply Stores (-\$1.5M)
-) Sporting Goods, Hobby, & Music Stores⁸ (-\$1.4M)
-) Book & Music Stores (-1.0 M)

Table 22 provides a full breakdown of the retail gap for the Town of Eastham by retail category.

Note that retail leakage in a category does not necessarily equate to retail potential. The surplus in the Restaurants/Other Eating Places indicates that Eastham is functioning as a dining (and drinking) destination.

⁸ From Eastham’s Registered Business Database, examples include fishing tackle and bike shops.

Table 22: Retail Leakage – Town of Eastham

NAICS	Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ (Surplus)
4411	Automobile Dealers	\$20,321,716	\$3,277,308	\$20,969,522	72.2
4412	Other Motor Vehicle Dealers	\$2,227,419	\$0	\$2,227,419	100
4413	Auto Parts & Tire Stores	\$1,697,695	\$0	\$1,697,695	100
4421	Furniture Stores	\$1,404,972	\$0	\$1,404,972	100
4422	Home Furnishing Stores	\$2,748,902	\$108,444	\$2,640,458	85.1
4431	Electronics/Appliance Stores	\$4,057,577	\$1,071,298	\$2,986,279	58.2
4441	Bldg. Materials & Supply Stores	\$7,140,251	\$1,675,861	\$5,464,390	33.5
4451	Grocery Stores	\$17,673,701	\$10,916,861	\$6,756,840	23.6
4461	Health & Personal Care Stores	\$7,485,516	\$0	\$7,485,516	100
4471	Gasoline Stations	\$10,043,452	\$3,269,452	\$6,773,562	50.9
4481	Clothing Stores	\$4,395,781	\$732,883	\$3,662,898	78.6
4482	Shoe Stores	\$743,995	\$0	\$743,995	100
4483	Jewelry, Luggage / Leather Goods Stores	\$983,103	\$0	\$983,103	100
4521	Department Stores	\$8,288,623	\$0	\$8,288,623	100
4529	General Merchandise Stores	\$3,781,329	\$0	\$3,781,329	100
4531	Florists	\$305,739	\$162,437	\$143,302	30.6
4532	Office Supplies, Stationary / Gift Stores	\$1,282,714	\$1,152,709	\$130,005	5.3
4539	Miscellaneous Store Retailers	\$4,499,982	\$2,430,331	\$2,069,651	29.9
7224	Drinking Places (alcoholic beverages)	\$457,210	\$0	\$457,210	100
4442	Lawn & Garden Equip Stores	\$686,425	\$2,218,809	-\$1,532,384	-52.7
4452	Specialty Food Stores	\$755,647	\$1,464,967	-\$709,320	-31.9
4453	Beer, Wine / Liquor Stores	\$1,962,280	\$6,562,021	-\$4,599,741	-54.0
4511	Sporting Goods / Hobby Stores	\$3,080,208	\$4,475,773	-\$1,395,565	-18.5
4512	Book & Music Stores	\$410,137	\$1,454,720	-\$1,044,583	-56.0
4533	Used Merchandise Stores	\$251,281	\$252,956	-\$1,675	-0.3
7223	Special Food Services	\$359,862	\$2,434,123	-\$2,074,261	-74.2
7225	Restaurants /Eating Places	\$9,178,884	\$15,108,361	-\$5,929,477	-24.4
Source: ESRI Business Analyst Online					

Primary Trade Area (5-Mile Radius)

There are fewer retail categories with leakage in the Primary Trade Area compared to the town. This is because the Primary Trade Area includes portions of the Town of Orleans which has a significant amount of retail facilities so while residents of Eastham may be making a large portion of their purchases outside of the town, many of them are made within the Primary Trade Area. The most significant sectors with leakage (at the 4-digit NAICS level) are:

- J Automobile Dealers (\$28.6M)
- J Department Stores (\$8.3M)
- J Health & Personal Care Stores (\$5.9M)
- J Electronics & Appliance Stores (3.83M)
- J Clothing Stores (\$2.4M)
- J Auto Parts & Tire Stores (\$1.96 M)
- J Jewelry, Luggage & Leather Goods Stores (\$1.6M)
- J Home Furnishings Stores (\$1.5M)

The Trade Area has some notable retail sectors with a negative retail gap (i.e., representing a net influx of spending). The most significant of these include:

- J Grocery Stores (-\$39.5M)
- J Restaurants/ Eating Places (-\$25.2M)
- J Other Motor Vehicle Dealers (-\$15.5M)
- J Building Materials & Supply Stores (-\$7.3M)
- J Beer, Wine & Liquor Stores (-7.2M)
- J Specialty Food Stores (-\$5.3M)
- J Used Merchandise Stores (-\$3.0M)
- J Sporting Goods & Hobby (-\$2.9M)
- J Special Food Services (-2.4M)
- J Book & Music Stores (-1.7M)
- J Lawn & Garden Equipment & Supply Stores (-\$1.4M)

Table 23 provides a full breakdown of the retail gap for the Primary Trade Area by retail category.

Table 23: Retail Leakage – Primary Trade Area

NAICS	Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus)
4411	Automobile Dealers	\$32,769,232	\$4,138,278	\$28,630,954	77.6
4413	Auto Parts & Tire Stores	\$2,754,047	\$787,960	\$1,966,087	55.5
4421	Furniture Stores	\$2,304,789	\$1,569,446	\$735,343	19.0
4422	Home Furnishing Stores	\$2,194,309	\$655,416	\$1,538,893	54.0
4431	Electronics/Appliance Stores	\$6,626,755	\$2,851,627	\$3,775,128	54.0
4461	Health & Personal Care Stores	\$12,135,863	\$6,222,743	\$5,913,120	32.2
4471	Gasoline Stations	\$16,207,928	\$8,859,379	\$7,348,549	29.3
4481	Clothing Stores	\$7,202,349	\$4,827,020	\$2,375,329	19.7
4482	Shoe Stores	\$1,217,406	\$416,729	\$800,677	49.0
4483	Jewelry, Luggage / Leather Goods Stores	\$1,624,401	\$0	\$1,624,401	100
4521	Department Stores	\$13,504,452	\$5,169,741	\$8,334,711	44.6
4529	General Merchandise Stores	\$6,123,807	\$2,855,725	\$3,268,082	36.4
4531	Florists	\$495,482	\$215,659	\$279,823	39.3
4412	Other Motor Vehicle Dealers	\$3,571,071	\$19,079,712	-\$15,508,641	-68.5
4441	Bldg. Materials & Supply Stores	\$11,535,549	\$18,890,307	-\$7,354,758	-24.2
4442	Lawn & Garden Equip Stores	\$1,094,098	\$2,481,486	-\$1,387,388	-38.3
4451	Grocery Stores	\$28,620,648	\$68,128,664	-\$39,507,816	-40.8
4452	Specialty Food Stores	\$1,224,751	\$6,540,229	-\$5,315,478	-78.6
4453	Beer, Wine / Liquor Stores	\$3,201,355	\$10,437,410	-\$7,236,055	-53.1
4511	Sporting Goods /Hobby Stores	\$5,023,880	\$7,960,105	-\$2,936,225	-22.6
4512	Book & Music Stores	\$670,676	\$2,330,400	-\$1,659,724	-55.3
4539	Miscellaneous Store Retailers	\$7,270,095	\$11,889,334	-\$4,619,239	-24.1
4532	Office Supplies, Stationary / Gift Stores	\$2,094,591	\$4,667,521	-\$2,581,930	-38.1
4533	Used Merchandise Stores	\$413,946	\$3,453,722	-\$3,039,776	
7223	Special Food Services	\$583,171	\$2,965,903	-\$2,382,732	-67.1
7224	Drinking Places (alcoholic beverages)	\$758,199	\$6,796,715	-\$6,038,516	-79.9
7225	Restaurants /Eating Places	\$15,019,572	\$40,240,827	-\$25,221,255	-45.6

Source: ESRI Business Analyst Online

Secondary Trade Area (10-Mile Radius)

The retail profile in the Secondary Trade area is similar to that of the Primary Trade Area. There are only a few retail categories with leakage and a greater number of categories with a surplus. The most significant sectors with leakage (at the 4-digit NAICS level) are:

- J Automobile Dealers (\$676M)
- J Department Stores (\$31.5M)
- J Electronics & Appliance Stores (11.2M)
- J Clothing Stores (\$6.1M)
- J Auto Parts & Tire Stores (\$4.1M)
- J Health & Personal Care Stores (\$3.4M)
- J Home Furnishings Stores (\$1.5M)
- J Jewelry, Luggage & Leather Goods Stores (\$1.2M)

The Trade Area has some notable retail sectors with a negative retail gap (i.e., representing a net influx of spending). The most significant of these include:

- J Grocery Stores (-\$74.9M)
- J Restaurants/ Eating Places (-\$65.92M)
- J Building Materials & Supply Stores (-\$47.7M)
- J Other Motor Vehicle Dealers (-\$25.1M)
- J Beer, Wine & Liquor Stores (-17.0M)
- J Specialty Food Stores (-\$14.4)
- J Used Merchandise Stores (-\$6.6M)
- J Lawn & Garden Equipment & Supply Stores (-\$5.9M)
- J Sporting Goods & Hobby Stores (-\$3.8M)
- J Book & Music Stores (-1.6M)

Table 24 provides a full breakdown of the retail gap for the Secondary Trade Area by retail category:

Table 24: Retail Leakage – Secondary Trade Area

NAICS	Industry Group	Demand (Retail Potential)	Supply (Retail Sales)	Retail Gap	Leakage/ Surplus
4411	Automobile Dealers	\$90,724,785	\$23,715,820	\$67,008,965	58.6
4413	Auto Parts & Tire Stores	\$7,802,019	\$3,608,603	\$4,193,416	35.8
4521	Department Stores	\$38,875,058	\$7,288,480	\$31,586,579	68.4
4481	Clothing Stores	\$21,142,731	\$14,821,302	\$6,121,429	17.6
4461	Health & Personal Care Stores	\$33,951,808	\$30,586,977	\$3,364,831	5.2
4529	General Merchandise Stores	\$17,254,785	\$10,191,490	\$7,063,295	25.7
443	Electronics/Appliance Stores	\$19,175,280	\$7,939,125	\$11,236,155	41.4
4471	Gasoline Stations	\$45,239,701	\$28,249,018	\$16,990,683	23.1
4421	Furniture Stores	\$6,714,097	\$6,051,713	\$662,384	5.2
4422	Home Furnishing Stores	\$6,300,119	\$4,766,837	\$1,533,282	13.9
4483	Jewelry, Luggage / Leather Goods Stores	\$4,889,134	\$3,711,762	\$1,177,372	13.7
4482	Shoe Stores	\$3,567,326	\$1,271,897	\$2,295,429	47.4
4531	Florists	\$1,401,604	\$411,281	\$990,323	54.6
4451	Grocery Stores	\$80,671,898	\$155,597,690	-\$74,925,792	-31.7
4412	Other Automobile Dealers	\$9,749,350	\$34,906,165	-\$25,156,815	-56.3
4441	Bldg. Materials & Supply Stores	\$32,076,831	\$79,756,260	-\$47,679,429	-42.6
4539	Miscellaneous Store Retailers	\$20,269,100	\$38,175,324	-\$17,906,224	-30.6
7224	Drinking Places (alcoholic beverages)	\$2,275,032	\$11,073,745	-\$8,798,714	-65.9
4532	Office Supplies, Stationary / Gift Stores	\$6,020,570	\$12,810,002	-\$6,789,432	-72.9
7225	Restaurants /Eating Places	\$43,717,752	\$109,680,525	-\$65,962,773	-43.0
4533	Used Merchandise Stores	\$1,231,012	\$7,862,792	-\$6,631,780	-72.9
4452	Specialty Food Stores	\$3,465,474	\$17,848,083	-\$14,382,609	-67.5
4453	Beer, Wine / Liquor Stores	\$9,267,106	\$26,334,273	-\$17,067,167	-47.9
7223	Special Food Services	\$1,668,590	\$4,550,841	-\$2,882,251	-46.3
4511	Sporting Foods/Hobby Stores	\$14,564,757	\$18,339,757	-\$3,775,000	-11.5
4512	Book & Music Stores	\$1,962,583	\$3,594,405	-\$1,631,822	-29.4
4442	Lawn & Garden Equip Stores	\$2,945,313	\$8,809,271	-\$5,863,958	-49.9
Source: ESRI Business Analyst Online					

Table 25 Retail Leakage Comparison

NAICS	Industry Group	Town of Eastham	Primary Trade Area	Secondary Trade Area
4411	Automobile Dealers	\$20,321,716	\$28,630,954	\$67,008,965
4413	Auto Parts & Tire Stores	\$1,697,695	\$1,966,087	\$4,193,416
4421	Furniture Stores	\$1,404,972	\$735,343	\$662,384
4422	Home Furnishing Stores	\$1,235,486	\$1,538,893	\$1,533,282
4431	Electronics/Appliance Stores	\$2,986,279	\$3,775,128	\$11,236,155
4461	Health & Personal Care Stores	\$7,485,516	\$5,913,120	\$3,364,831
4471	Gasoline Stations	\$6,773,562	\$7,348,549	\$16,990,683
4481	Clothing Stores	\$3,662,898	\$2,375,329	\$6,121,429
4482	Shoe Stores	\$743,905	\$279,823	\$2,295,429
4483	Jewelry, Luggage / Leather Goods Stores	\$983,103	\$1,624,401	\$1,177,372
4521	Department Stores	\$8,288,623	\$8,334,711	\$31,586,579
4529	General Merchandise Stores	\$3,781,329	\$3,268,082	\$7,063,295
4531	Florists	\$983,103	\$800,677	\$990,323
4412	Other Automobile Dealers	2,227,419	-\$15,508,641	-\$25,156,815
4441	Bldg. Materials & Supply Stores	\$5,464,390	-\$7,354,758	-\$47,679,429
4451	Grocery Stores	\$17,673,701	-\$39,507,816	-\$74,925,792
4532	Office Supplies, Stationary / Gift Stores	130,005	-\$2,581,930	-\$6,789,432
4539	Miscellaneous Store Retailers	\$1,798,019	-\$4,619,239	-\$17,906,224
7224	Drinking Places (alcoholic beverages)	457,210	-\$6,038,516	-\$8,798,714
4442	Lawn & Garden Equip Stores	-\$1,532,384	-\$1,387,388	-\$5,863,958
4452	Specialty Food Stores	-\$1,962,280	-\$5,315,478	-14,382,609
4453	Beer, Wine / Liquor Stores	-\$4,599,741	-\$7,236,055	-\$17,067,167
4511	Sporting Foods /Hobby Stores	-\$1,395,565	-\$2,936,225	-\$3,775,000
4512	Book & Music Stores	-\$1,044,583	-\$1,659,724	-\$1,631,822
4533	Used Merchandise Stores	-\$1,675	-\$3,039,776	-\$6,631,780
7223	Special Food Services	-\$709,320	-\$2,382,732	-2,882,251
7225	Restaurants /Eating Places	-\$5,929,477	-\$25,221,255	-\$65,962,773
Source: ESRI Business Analyst Online				

Retail Potential Analysis

The retail potential analysis estimates the number of new supportable retail businesses in the Town of Eastham based on the potential to recapture a portion of retail leakage. This analysis typically uses the previous leakage analysis and factors in the additional spending from future residents which then serve as the **total retail spending potential** for a 5-year outlook. As shown in Table 26 the

Table 26: Eastham Demographic Projections

	2010	2020	2025
Population	8,062	8,591	8,673
Number of Households	3,885	4,121	4,151
Median Household Income		\$64,579	\$70,443
Average Household Income		93,119	102,923
Per Capita Income	\$44,784	\$44,784	\$49,392
Median Age	56.5	59.9	62.1
Source: US Census (2010) and ESRI (2020, 2025)			

Primary Trade area is anticipated to experience limited growth over the next 5 years.⁹ The overall population is expected to increase by 0.95% and the number of households is expected to increase by 0.72%. From the perspective of retail sales, this would result in an increase in total retail sales of just over \$1 Million. Therefore, the retail gap analysis based upon the existing population is a relatively accurate predictor of the potential over a 5-year period.

Based upon the retail gap analysis, there are a handful of retail categories that could support new businesses. These are summarized in Table 27. (Certain retail categories such as gasoline stations and department stores were not included on this because even if there is leakage, these uses are determined not to be appropriate for the trade area.) Retail categories are divided into “**Convenience**” and “**Destination**”. Convenience retail business are those that cater to the day-to-day needs of residents. Destination retail businesses are those where residents shop only periodically and are willing to travel longer distances.

Additionally, since one can never expect to capture 100% of the leakage as some purchases will always be made outside to the trade area, and some will be made online, one needs to establish a capture rate. A conservative recapture rate of 20% is applied to the retail gap for the convenience category to estimate the capturable leakage. A 10% recapture rate is applied for the destination category because local residents are willing to travel further for these types of goods. Recapture rates were selected based on professional experience and are not intended to be precise, but rather reflect a reasonable estimate of the leakage that can be recaptured. The capturable leakage is then used to estimate supportable square feet. The estimated supportable square feet of new retail are provided based on an industry standard figure of \$300 per square foot. The estimated supportable square feet reflect the approximate total potential for each retail category for new and/or expanded retail space.

As shown in Table 27, **there is future potential for approximately 25,000 SF of new retail space within the Primary Trade Area.** The categories with the greatest potential are Health & Personal Care stores, Electronics & Appliance stores and Home Furnishing stores. Note again that “potential” in this analysis is defined as those retail categories where new businesses could capture enough of the retail gap to be successful and does not factor in other considerations such as the further expansion of online retail. It should be further noted that this analysis is based upon spending by residents of the trade area and does not include spending by tourists. The categories for which Eastham could support additional retail suggest there is potential to attract new businesses in these categories.

⁹ Note that these projections do not capture the disruptive impact of COVID-19, which may result in population changes and shift in spending habits that is unaccounted for in the model.

Table 27: Potential Retail Growth

Retail Category	Retail Gap	Recapture Potential (20% Convenience; 10% Destination)	Estimated Supportable Square Footage
Convenience Retail Categories			
Health & Personal Care Stores	\$5,913,120	\$1,183,824	3,946 SF
General Merchandise Stores	\$3,268,082	\$653,614	2,179 SF
Destination Retail Categories			
Auto Parts & Tire Stores	\$1,966,087	\$196,609	655 SF
Furniture Stores	\$735,343	\$73,534	245 SF
Home Furnishings Stores	\$1,538,893	\$153,889	5,130 SF
Electronics & Appliance Stores	\$3,775,128	\$377,512	12,584
Clothing Stores	\$2,375,329	\$237,533	792 SF
Shoe Stores	\$800,677	\$80,068	267 SF
Jewelry, Luggage & Leather Goods Stores	\$1,624,401	\$162,440	541 SF
Florists	\$279,823	\$27,982	93 SF
Source: ESRI Business Analyst, LDA			

Section 3: Market Trends

Overview

Eastham is located on the outer portion of Cape Cod, a peninsula encompassing 15 towns that extends 60 miles into the Atlantic Ocean. The Cape's natural environment, coastal resources and rich cultural history are critical to its character, economy, and sustainability. Cape Cod on the whole faces economic challenges related to climate change, the high cost of living, and the impacts of seasonal population changes on its environment and infrastructure.



Eastham Windmill Green

Cape Cod is commonly divided into four sub-regions. Eastham is located in the Outer Cape subregion, along with Wellfleet, Truro, and Provincetown. It lies adjacent to the Lower Cape, a subregion that includes Orleans, Brewster, Harwich, and Chatham. Having the highest degree of fluctuation in year-round versus seasonal populations, Outer Cape towns are more rural in character than other Cape communities, as well as more focused on the tourism economy. The Cape Cod National Seashore is a dominant feature, occupying more than 27,000 acres across the Outer Cape and portions of Orleans and Chatham. The Lower Cape forms a transitional span between the Outer Cape and the more suburban Mid Cape which contains the Cape's retail and commercial center. Lower Cape towns tend to have more year-round population than the Outer Cape, and to have older and more affluent populations. Orleans and Chatham have the highest median home prices on Cape Cod.¹⁰

As an Outer Cape community, Eastham's business climate is highly seasonal. Accommodations, restaurants, retail, and other services that serve tourists and seasonal residents weather steep fluctuation in revenues between the summer and winter months. For many businesses the shoulder seasons can still be fairly strong, but January and February are typically very slow. Long-time businesses have adjusted to the seasonality, and local banks support businesses with commercial lending tailored to this pattern. However, some interview participants observed a

¹⁰ 2019 Cape Cod Comprehensive Economic Development Strategy (CEDs) 2019-2023

Impacts from COVID-19

Reported by business owners interviewed for this study

COVID-19 has had a mixed impact on local businesses. Many people who live in urban areas sought to relocate to areas like Cape Cod to have more access to the outdoors and natural environments. The pandemic-driven migration brought more younger households to purchase homes on the Cape – often skilled, educated professionals bringing their own jobs to work remotely, but not necessarily enrolling their children in local schools. Moreover, interest in local leisure travel increased as people pivoted away from international or long-distance domestic destinations, so that demand for accommodations remained strong throughout the peak season and longer into the fall of 2020. Commercial activity related to real estate sales, accommodations, property maintenance, and home improvement soared over the past 12 months. On the other hand, indoor, location-dependent businesses such as restaurants and retailers suffered a sharp decline in revenue that lasted through the year due to the decrease in capacity of customers they could serve, which constrained revenues. Many food establishments that were able to pivot to outdoor dining or take-out sales were able to take advantage of higher demand; however, they may have still been hampered by operational changes to adapt to COVID-19 safety requirements. It cannot be certain how many of the market changes will linger after the pandemic passes.

The Cape Cod Commission surveyed businesses about the impacts of the COVID-19 pandemic in May and August of 2020, focusing on business losses and the support needed to be able to weather the crisis. The results of a third survey distributed in January of 2021 are anticipated to be released imminently.

trend over the past decade toward more businesses staying open year-round and remaining busy longer into the shoulder seasons.

Eastham's economy is dominated by small local businesses, which is also common to the Outer Cape. Visible commercial activities are predominantly concentrated along Route 6, Holmes Road and Brackett Road. A field study and interviews gave the impression that there is low commercial vacancy in Eastham. **In fact, a lack of available commercial space or barriers to expanding building area are more frequent complaints.** At the same time, **a significant share of Eastham's businesses are home-based enterprises**, which are scattered throughout the community.

Sector Analysis

Following is a description of existing conditions and trends for each of the target industries that have significant presence in Eastham's economy today, identifying where there is potential for growth. The analysis focuses on three principal sectors that are of unique importance to Eastham, including tourism, retail, and amenities that serve both year-round residents and visitors; trades, property maintenance, and specialty production/distribution; and the "blue economy" – fishing and natural resource-based businesses. In addition, the analysis identifies

current trends and needs with respect to health and human services and professional office space.

Tourism, Retail and Amenities

Tourism plays an important role in Eastham's economy. According to the North Eastham Village District study, the population during the summer months increases by approximately 20,000 people. A recent study conducted by the National Park Service determined that in 2018, approximately 4 million people visited the National Seashore, and that total visitor spending was just under \$500 million.



Ocean Park Inn

According to the study, the average party (3 persons) spends \$158 per day during their visit to National Parks. Lodging expenses account for the largest share of visitor spending. Food expenses account for the next largest share of expenditures. Based upon these numbers, it can be estimated that seasonal residents and visitors to Eastham contribute approximately \$1 million per day to the local economy. Over a 10- week period, this amounts to \$70 million. While the largest share of this spending is for lodging, a significant amount is spent on food expenses with some small amount spent on other retail. Because of the short-term nature of this spending, it is difficult to include it in the Retail Gap Analysis, but this additional spending cannot be ignored and should be taken into consideration in any location decision.

Hospitality

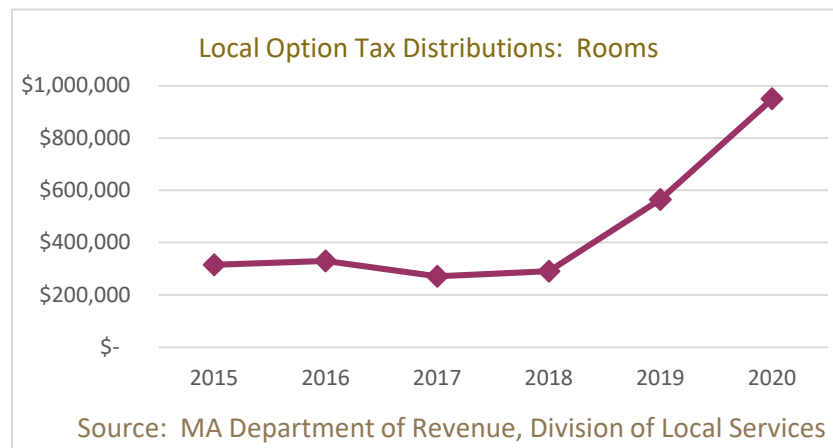
There are 30 registered lodging establishments in Eastham, including hotels/motels, inns/bed & breakfasts, and cottage rentals, with a combined total of 618 rooms. The majority are small establishments; 17 offer fewer than 10 guest rooms or suites, while only 7 have capacity of more than 20 rooms.¹² There may be additional **short-term rental** enterprises which are not registered as businesses in Eastham.

Hotels in Eastham serve almost entirely leisure travel, in contrast to other markets that have more business travel. Four Point Sheraton hotels in other locations generate about half of their revenue from local corporate accounts. Local companies use Four Point Sheraton Eastham's meeting space primarily, and very rarely use guest rooms. The busy season runs from early May

¹¹ North Eastham Village Center Strategic Report & Concept Plan, 2007

¹² Town of Eastham, Board of Health

through Columbus Day; however, roughly 50-60 percent of hotel revenue is generated between Memorial Day and Labor Day.¹³



Eastham imposes a 4 percent room occupancy tax in addition to the 2.75 percent water protection fund tax rate for Cape Cod.¹⁴ Rooms tax revenue increased significantly in 2019 due to the passage of the Cape Cod and Islands Water Protection Fee, which is included in the local options tax distribution

reported by the Division of Local Services. Room tax revenues rose further in 2020 as the COVID-19 pandemic dramatically increased demand for short term rentals¹⁵ across the Cape.

In 2020 the occupancy rates were slightly better than the pessimistic forecast for July, August, and early fall, after having been extremely low at the beginning of the summer. Overall, 2020 revenues were significantly impacted by COVID-19 restrictions and lower pricing across the industry. The 2021 season is anticipated to generate revenues close to what they were in 2019 assuming many of the state/local COVID-19 related restrictions are lifted and vaccinations have positive effects.¹⁶ Observations in spring of 2021 have shown a significant increase in bookings for the upcoming summer season.¹⁷

Most of the older motels are reaching obsolescence, but as configured today they could not generate sufficient revenue to justify the investment in updating these properties. There is unmet demand for more high quality hotel space to serve Eastham and the outer Cape, but the seasonality of the market and the constraints on septic capacity to increase the number of rooms make it financially infeasible to build a hotel to serve this market.

“All of our guests are tourists. Promoting Eastham’s unique location on the Cape and in the Cape Cod National Seashore, as well as tourist-centric features like beaches, restaurants, shopping and recreation helps to draw our customers here.”

– Survey respondent, hotel owner

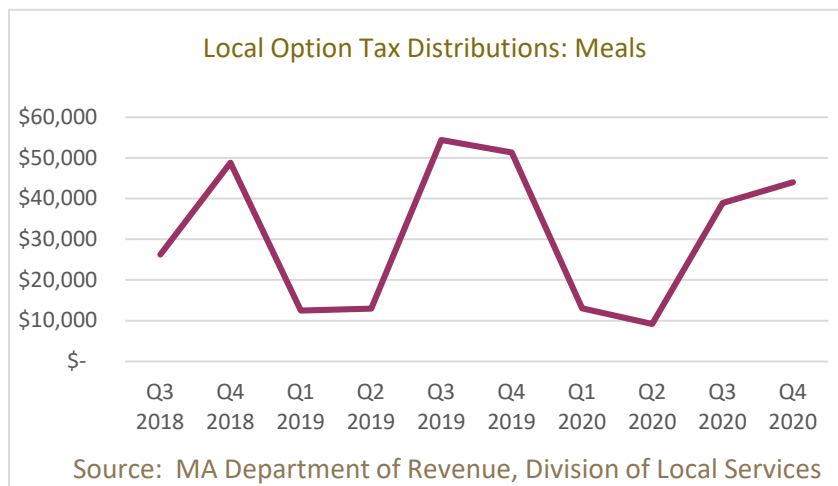
¹³ Interview with Jignesh Patel, J&R Management / Four Points Sheraton and Ocean Park Inn, 2/26/2021

¹⁴ Massachusetts Department of Revenue, Division of Local Services

¹⁵ Short Term Rentals are rooms, condominiums, or housing units which are rented for less than 30 days at a time through the use of advance reservations, but are not hotels, motels, inns, or bed & breakfast establishments.

¹⁶ Interview with Jignesh Patel, J&R Management / Four Points Sheraton and Ocean Park Inn, 2/26/2021

¹⁷ ‘We’ve never seen anything like it’: the rush is on to book summer rentals, Boston Globe, 4/8/2021



Eastham adopted the meals tax local option in 2018, adding 0.75 percent to the state meals tax on food and drink sold in restaurants. In 2019, the first full calendar year for which the local meals tax was collected, the meals tax generated a total of \$131,000. Quarterly revenues fluctuated between \$12,500 in the off-season to \$54,000

during the peak summer season in 2019. Despite the increase in seasonal population and visitors in 2020, the pandemic forced restaurants to reduce indoor seating capacity which resulted in a drop in restaurant sales. (Restaurants that were able to pivot toward more take-out and outdoor seating reported level or higher sales last year.) The total revenue generated from meals tax in 2020 was \$105,000.

There is desire for more upscale and/or year-round restaurant options in town, but the seasonality and regulatory limitations, primarily due to septic capacity, make it prohibitive to open new restaurants in Eastham. While these constraints apply to all

restaurants, low-end, family style restaurants have an easier time getting established under these market conditions because they appeal to a broader base of customers. **Operating out of food trucks could help to lower the cost of establishing new food options by reducing the need to support a seasonal business in permanent real estate,** however the regulations in Eastham and other Cape communities make food trucks difficult and costly to manage.



Hole in One Bakery

Retail

According to estimates provided by ESRI Business Analyst, the Town of Eastham is home to 230 businesses which employ an estimated 1,600 people.¹⁸ Of the 230 businesses, 65 are in the retail

¹⁸ ESRI estimates of the number of businesses in Eastham rely on 2017 data from Dun & Bradstreet.

trade (including eating and drinking establishments). These businesses account for 494 jobs which represents approximately 31% of all employment in the town. The town's retail businesses have estimated combined sales of over \$58 million annually.

Food Services & Drinking Places is overwhelmingly the largest component of the town's retail industry with 21 businesses (32% of all retail), 321 employees (65% of all retail), and \$17.5 million in sales (30 % of all retail sales). By comparison, Food Stores ranks second with 15% of all retail employment but 33% of all retail sales. These two categories represent two-thirds of all retail sales in Eastham.¹⁹

Table 28: Retail Industry Overview – Town of Eastham (2020)

Retail Category	Businesses		Employees		Sales	
	#	%	#	%	#	%
Food Services & Drinking Places	21	32	321	65	\$17,542,484	30
Food & Beverage Stores	13	21	75	15	\$18,943,849	33
Sporting Goods, Hobby, Book, & Music	8	13	38	8	\$5,930,493	10
Miscellaneous Store Retailers	4	6	6	1	\$2,430,331	4
Bldg. Material & Garden Equipment	7	11	30	6	\$3,894,670	7
Health & Personal Care Stores	0	0	0	0	\$0	0
Gasoline Stations	2	3	5	1	\$3,269,452	6
Clothing & Clothing Accessories Stores	3	5	6	1	\$732,883	1
Motor Vehicle & Parts Dealers	1	2	5	1	\$3,277,308	6
Electronics & Appliances Stores	1	2	7	2	\$1,071,298	2
General Merchandise Stores	0	0	0	0	\$0	0
Non-store retailers	2	3	0	0	\$834,869	1
Furniture & Home Furnishings Stores	1	2	1	<1	\$108,444	<1
Total	63	100%	494	100%	\$58,036,081	100%
Note: Includes Food Services & Drinking Places, which is within the Accommodation & Food Services NAICS Industry						
Source: ESRI Business Analyst Online (Ranked by number of employees)						

Following are conclusions about retail potential drawn from the Retail Gap Analysis:

-) There is limited demand for additional retail facilities within the Primary Trade Area. According to the retail gap analysis, the Primary Trade Area can support an additional 25,000 square feet of retail space in a limited number of categories.

¹⁹ Note that the retail industry statistics provided in the table represent ESRI's classification of businesses by NAICS code based on Census and other data. There is no central government agency with the role of assigning, monitoring, or approving NAICS codes for establishments. Individual establishments are assigned NAICS codes by various agencies for various purposes using a variety of methods. Generally, the U.S. Census Bureau's NAICS classification codes are derived from information that the business establishment provided on surveys, census forms, or administrative records. ESRI also utilizes additional methods to assign and verify NAICS codes. Data may not be 100% accurate but fall within an acceptable margin of error for analysis purposes.

) Although the trade area experiences leakage in several retail categories, many retail facilities are located within a 20-minute drive of the Primary Trade Area. This is a limiting factor on the Primary Trade Area's ability to support new retail. However, the low vacancy rate in Eastham's current retail inventory supports the conclusion that the trade area can support some new retail establishments.

) The Retail Gap Analysis did not address the effects of the COVID-19 pandemic on the retail economy. Although the highly conservative capture rate does anticipate that some portion of retail spending takes place online, it will take several years before we truly understand the impact the COVID-19 pandemic had on the retail economy.

) According to ESRI's analysis, the population in the Primary Trade Area is only expected to increase by 30 households over the next five- year period. This small increase in population would not contribute to creating new retail opportunities. The impacts of COVID-19 may shift the population growth curve, but it is too soon to gauge the permanence of the change in trends.

) The large number of seasonal visitors to the region contributes significant amount of dollars to the local economy over a 10-week period.

) The Town of Eastham along with the primary and secondary trade areas has a concentration of high-income older households representing market opportunities for more upscale and luxury retail – particularly boutique retailers rather than national chains that typically require a greater population base.

) The Trade Area Population has consumer behaviors which includes a propensity to travel and take vacations, going to live theater performances, and eating organic food. This market segment is supportive of arts and culture, likes to garden, and invest in their homes. These traits may pose niche market opportunities.

) New upscale entertainment options may also be feasible given the characteristics of this segment such as a wine bar, microbrewery, or a "paint and sip" establishment.

"I would like to see more year-round businesses and places to congregate outdoors, such as a coffee shop with outdoor seating. Food trucks, farmer's markets or marketplaces would make it feel more like a town."

– Survey respondent, home-based business owner



Buddha Bob's

Local stores have fared better than national retailers during the pandemic.²⁰ Love Live Local is a regional organization supporting a Shop Local campaign. Interview participants suggested that retailers would be more likely to thrive if there was a town center area that was more walkable. Route 6 is an impediment to circulation between businesses and for getting cars to slow down and turn off the highway.

There is a lack of quality retail oriented to full-time and seasonal residents and a preponderance of retail oriented towards the tourist trade such as gift shops. On the other hand, Orleans has emerged as the retail hub and offers both high quality and convenience retail. This limits the opportunities in Eastham. The small full-time population makes it difficult to support most national chains (such as the type of stores found at Mashpee Commons and the Cape Cod Mall) so retail development most likely needs to be independent, small scale retail.

Arts, Culture, and Recreation

Arts, culture and recreation contribute to Eastham's appeal for both residents and visitors.

Eastham's primary attractions are its natural resources – Cape Cod National Seashore, Cape Cod

Rail Trail and beaches along Cape Cod Bay – as well as cultural sites such as the National Park Service Salt Pond Visitor Center, unique historic landmarks, and the Schoolhouse Museum.

Eastham's public library is also identified as a special destination. **Indoor and outdoor events that highlight local businesses, arts, and recreational opportunities help to generate more traffic to hospitality and retail businesses, especially outside of peak season.**

Much of the arts economy is informal, and is thus difficult to capture. According to the Massachusetts Executive Office of Labor and Workforce Development (EOLWD), there are 18 people employed in Arts, Entertainment, and Recreation jobs in the community. This data overlooks people who are self-employed or moonlighting, or artists whose businesses might be classified as retail or professional services. The Town's database of registered businesses shows 26 establishments engaged in some form of



Installation outside of Eastham Superette

²⁰ "National Chains" referring to stores selling merchandise, as opposed to national fast food chains and franchises, such as Dunkin Donuts, Ben & Jerry's, or Wendy's.

visual arts, music, hand-crafts, or creative professions. All but 4 of these are listed as home-based businesses.

Eastham's arts community is supported by the Eastham Painter's Guild, as well as organizations and events throughout the Outer and Lower-Cape region that provide channels for local artists to show, exhibit, and sell their work. The Schoolhouse Museum, home to the Eastham Historical Society, provides a venue for artists to exhibit as well as displays of local historical artifacts. The Covid-19 pandemic necessitated the closure or severe restriction of indoor arts and cultural activities, however online galleries and outdoor events continued to draw interest throughout 2020.

Recreation activities such as indoor fitness classes and outdoor experiences serve year-round residents as well as tourists. Eastham has a handful of businesses in this category, including miniature golf, yoga and fitness studios, kayak rentals, Timbernook Children's summer camp, and Willy's World Wellness & Conference Center. Access to the outdoors is one of Eastham's strongest attractions as a destination, yet there are few businesses that specifically cater to that interest. **There is potential for expansion of services and retail targeted to health & fitness and outdoor recreation.**

Trades

Construction, home improvement, and property maintenance are the largest contributors to Eastham's economy, providing a wide range of year-round services oriented to full-time and seasonal residents, as well as businesses and rental properties. EOLWD identifies 43 construction businesses employing 265 workers, representing 21 percent of Eastham-based jobs, which offer relatively high wages averaging \$58,000 per year. Eastham has a considerably higher concentration of jobs in this



Ace Hardware patronized by tradespeople

sector compared with Barnstable County or the state (7 percent and 5 percent, respectively). Some jobs related to property management may also be captured in real estate, rental & leasing, waste services, and other services. The Town has registered 41 building and home improvement businesses, and 78 businesses related to home and property services, which include specific tradespeople, handyman services, landscaping, cleaning, and waste disposal. In addition, there are 5 registered businesses engaged in real estate and property management.

Besides building and property management trades, Eastham also has a small cohort of businesses involved in food processing or other manufacturing and distribution activities, most significantly

People come to buy coffee all the time. We offer complementary hot coffee, but we would love to be able to sell it.

– John Simonian, Beanstock Coffee

Beanstock Coffee Roasters and Wellfleet Shellfish Company who are complementary neighbors on Holmes Road, and New England Biochar. Food producers expressed the desire to be able to sell their products directly to consumers on site or in some kind of market space in the community that could be shared with other specialty foods products from the Cape. A cluster of specialty food producers could provide for a unique local destination, especially if they can provide tours and on-site retail.²¹

Garage bays, warehouse space, or commercial buildings suitable for tradespeople and industrial uses are in limited supply, with a concentration located on Holmes Road. The Assessor's database identifies 14 such properties as "storage", containing a total of 64,000 square feet. The majority of construction, trades and property maintenance businesses are home-based, frequently entailing storage of commercial vehicles and equipment on residential properties scattered throughout the town.

Several business owners interviewed for this study report that they are operating with insufficient space and would like to expand, or make arrangements to share storage or operating space with other businesses. The lack of space for expansion combined with a shortage of labor and workforce housing could potentially drive businesses out of Eastham or off-Cape.

The scarcity of rental space for tradespeople can also be a significant constraint for attracting new start-ups, where younger workers are less likely to have the income required



Holmes Road business directory



Commercial bays on Holmes Road

²¹ Interview with John Simonian, Beanstock Coffee, 2/24/2021

to buy a home in town that would provide space to store vehicles and equipment or conduct on-site operations.

Blue Economy

The “Blue Economy” is defined as commercial activity that is directly dependent upon marine resources. Top industries within this category include shell fishing, marinas, environmental conservation organizations, finfish fishing, and recreational businesses like yacht clubs and charter boats. Across the Cape, Blue Economy businesses are expected to grow in terms of employment, revenues, and establishments.²²

Eastham, like neighboring communities on the outer Cape, has a notable presence of Blue Economy businesses, including commercial fishing, shellfishing, aquaculture, charter boats, and water-based recreation. Locally, it can be hard to measure the extent of these commercial activities because the nature of the business may not be reflected in aggregated NAICS categories available at the town level. Also, a significant share of people engaged in these activities are self-employed or moonlighting, so that they are often not captured in industry data. As shown in Table 29, the Cape Cod Blue Economy Foundation identifies 45 businesses in Eastham that are either directly or indirectly dependent on the Town’s marine resources.

Table 29: Blue Economy Businesses in Eastham

Type of Business	
Amusement/Recreation	4
Business Services	4
Construction/Sand & Gravel	1
Eating Places	6
Engineering Services	2
Fish and Seafoods	1
Fish Hatcheries	1
Heavy Construction	1
Hotels and Motels	9
Wildlife Conservation	1
Services	7
Shellfish	1
Sporting Goods	3
Trailer Parks	1
Water Transportation Services	1
Other	2
Total	45
Source: Cape Cod Blue Economy Foundation	

Fishing and Shellfishing

In all, the Cape Cod Blue Economy Foundation estimates that the Cape supports 1,900 commercial fishermen, which is 30 percent of the total state-wide.²³ In Eastham alone, the American Community Survey estimates that 68 residents are employed in natural resource-based industries (including fishing, agriculture, and mining)²⁴. Eastham is home to commercial fisheries for finfish, shellfish, and lobster. Fishing-related businesses also include wholesalers and some specialty foods processing, retail, or eating establishments. There are 8 businesses registered in town that entail commercial fishing and distribution, and at least two eating establishments that market locally-caught fish. Also related to fishing are businesses that

²² Cape Cod Blue Economy Project Implementation Plan, 2019

²³ CEDS 2019

²⁴ ACS 2015-2019

provide equipment and boat repairs. Eastham has one registered boat repair business, but fishing equipment is typically purchased from suppliers located off-Cape.

The town has around 40-50 moorings or slips for commercial vessels. In addition, many commercial vessels most commercial fishing vessels launch from boat ramps.²⁵ Most

commercial fishing is based out of Rock Harbor, and at Nauset Marsh and Town Cove, while Collins Landing is a launching site primarily used by commercial fishermen and shellfish growers. The Town issues an average of 140 commercial shellfishing permits annually, many of which are held by fishermen who reside in Orleans. In 2020 there were 65 permits held by individuals based in Eastham.²⁶ The Town has designated Aquaculture Development Areas (ADAs) in Cape Cod Bay and Nauset Marsh, and offers 30 aquaculture licenses for growing oysters and some quahog. Most people who derive income from fishing are not formally established as businesses; in 2020 only four establishments on the registered business list were commercial shellfishing permit-holders.

Wellfleet Shellfish is one of the town's larger employers, employing 20-40 people depending on the season. As a seafood wholesaler they work without approximately 1,000 vendors on a rotating basis, about 400 of whom are based on the Outer Cape, with the remaining from elsewhere on Cape Cod or Massachusetts. Most vendors are young families who are deriving their primary source of income from fishing. Wellfleet Shellfish sells and ships across the country, competing with other wholesalers from Boston, New Bedford, and New York. Only a small share of their product is purchased by restaurants or retailers on Cape.²⁷

According to the Harbor and Waterways Plan (2020), stocks of some finfish have declined, while lobster and quahog fisheries have experienced recent increases in activity and shellfishing has been stable. **Aquaculture has been experiencing new growth in Eastham, but has been limited by space, as there are waiting lists for the ADAs. There is also a need for more storage space for boats and gear.** As with the trades, some business owners are unable to find suitable storage space and are forced to store equipment and gear in the yards of their homes.²⁸



Aquaculture at Collins Landing

²⁵ Harbor and Waterways Plan (2020)

²⁶ Interview with Nicole Paine, Town of Eastham Shellfish Constable, 2/16/2021

²⁷ Interview with Alex Hay, Wellfleet Shellfish Company, 2/24/2021

²⁸ Interview with Nicole Paine, Town of Eastham Shellfish Constable, 2/16/2021

While there is plenty of supply available, fisheries are dependent sufficient consumer demand and enough wholesalers to buy their product and bring it to market. Considered “luxury foods”, demand for shellfish has been vulnerable to downturns in the economy. Commercial shellfishing was particularly impacted in 2020 by the reduced demand from restaurants due to COVID-19. In order to keep afloat, many commercial fishermen shifted their focus to expanding into grocery stores although the retail food market generates less revenue.²⁹

Recreation, Conservation, and Research

Marine science and educational institutions have generated emerging opportunities for growth in marine technology on Cape Cod, but are generally concentrated in the Upper Cape region near the Woods Hole Oceanographic Institute. It is less likely that organizations would locate on the Outer Cape to be affiliated with these institutions. However, Eastham’s marine resources and natural environment offer distinct opportunities for recreational or educational experiences, advocacy, and research.

Established in 1966, the Cape Cod National Seashore (CCNS) is a dominant feature of the Outer Cape, protecting over 27,000 acres of pristine open space and drawing approximately four million visitors per year.³⁰ Approximately one-third of Eastham is located within the CCNS, preserving unique natural and historic resources and popular beaches. CCNS employs a research team with seven year-round staff, 3 permanent staff members who work less than the full



Cape Cod National Seashore

year, and seasonal staff and interns who bring the team to 20-25 people over the summer. Most field work is carried out between March and October. The National Park Service collaborates with partner organizations such as the Provincetown Center for Coastal Studies, Atlantic White Shark Conservancy based in Chatham, federal and state government, and universities. They issue about 30 to 50 research permits each year to outside researchers. CCNS also coordinates with local Town staff on conservation and resource management practices.

According to the National Park Service, the Salt Pond Visitor Center located in Eastham serves close to 500,000 visitors annually. Bordered by the Atlantic Ocean and Cape Cod Bay, Eastham offers numerous beaches as well as freshwater ponds that provide opportunities for swimming

²⁹ Interview with Alex Hay, Wellfleet Shellfish Company, 2/24/2021

³⁰ Cape Cod National Seashore Visitor Spending Effects Analysis, 2018

and boating. The number of recreational shellfishing permits issued by the Town, ranging from 1,500-2,000 annually, demonstrates the popularity of water-based experiences.



Boat launch at Rock Harbor

Aiming to help visitors to enjoy these resources, Eastham has 5 registered businesses that provide water-based recreational experiences, including charter fishing, excursions, kayaking, surfing, and diving, as well as one retailer that provides supplies for recreational fishing. There are two commercial moorings for charter boats out of the municipal marina at Rock Harbor.³¹ One registered

business is described as boat building and repair. **There is further potential to serve tourists and seasonal residents with experience-based activities such as excursions, rentals, nature-based education, or sales and service of vehicles and gear.** Cape Cod Regional Technical High School offers training in boat building /repairs and could partner with local businesses to encourage expansion of this trade.

Other natural resource-based businesses include education, research, advocacy, or environmental consulting services. An Eastham-based example is Wild Care, a wildlife rehabilitation center that provides rehabilitation services for sick, orphaned and injured wildlife, and also runs education and outreach programs. Located in Eastham since 2004, Wild Care has plans to expand their facilities to provide space for animals arriving at their facility from the public. This expansion will include a bathroom and an "experience" section, as well as a separate washroom for disinfecting animal cages, etc.³²

There may be further opportunities to build on science and research associated with the Cape Cod National Seashore and to attract additional conservation and research activities to Eastham, but they would likely be small in scale, comparable to other professional entities located in town today.

Health & Human Services

Education, health and human services comprise 12 percent of local jobs, which is a relatively small share compared with 25 percent of jobs across Barnstable County and 28 percent statewide. This suggests that the town is underserved by providers of services such as health care, childcare, veterinary care, or that support community health.

³¹ Harbor and Waterways Plan, 2020

³² Interview with Stephanie Ellis of Wild Care Cape Cod, 3/3/2021

There is a need for health care to serve year-round residents as well as the summer population of Eastham and the Outer Cape. A rising senior population, in particular, suggests that the need for health care services will continue to grow. According to ESRI Business Analyst, the average person in Eastham spends approximately \$7,000 per year on medical and medical-related expenditures. This is significantly above the national average. By 2025, it is anticipated that the average annual expenditure per person will increase to \$18,500. This increase will create additional needs for medical services.

There are few healthcare practices within Eastham. Residents mainly access healthcare in facilities located in the mid-Cape. A new medical building is planned in Orleans that will provide 6,500 square feet offering primary, specialty and urgent care services. **However, there is still potential to support more medical services for Eastham and the Outer Cape region.**

The Outer Cape in general is underserved by facilities for childcare and family services. Cape Cod Children's Place, which serves 8 towns on the Outer and Lower Cape, originated through a grass-roots initiative to address this gap. YMCA of Cape Cod also provides support to children, families, and seniors in locations throughout the Cape. Healthy living and recreational programming have been severely impacted by COVID-19 over the past year; however, the need has shifted to support virtual learning. These and similar programs are supported through public funding (local, state, and federal) and partnerships with schools, churches, and local employers.

A constraint to expanding education, health care and social services is the difficulty of hiring sufficient staff. The cost of living – particularly the cost of housing – is a major barrier to meeting the needs for this sector in Eastham and the Outer Cape region. Input provided by focus group participants for this study indicated that **childcare is prohibitively expensive without public subsidies.**

Professional Office

Eastham has a very small inventory of professional office space. The Assessor's database lists only 12 properties, including stand-alone properties and office condominiums, that contain a total of 22,000 square feet. Many offices may also be located in residential/commercial mixed-use buildings, of which there are 60 properties scattered throughout the town. These spaces are occupied by a wide variety of businesses, such as attorneys, accountants, consultants, realtors, builders, health care practitioners, etc.



Office Space at Brittany's Way

Most of the businesses that would tend to utilize professional office space in Eastham are small establishments or solo practitioners, and the majority are working from home.³³ There is not likely potential to attract larger office tenants to locate in Eastham.

“**Coworking**” or shared office space offers a combination of fully furnished private offices, communal work spaces, meeting rooms, and amenities such as mail service and high speed internet connection. The types of businesses that tend to utilize these spaces include microbusiness startups, professional services, and corporate employees working remotely.

There is unmet demand for this type of space, but the amount that can be absorbed in the Outer Cape region is limited because there is not sufficient population density and people are not willing to drive long distances.³⁴

“I wish there were more co-working options or an area to go outside the home to work with flexibility and interaction with others.”

– Survey respondent, owner of Eastham-based consulting firm

With COVID-19 related cultural shifts toward working from home, it is likely that the Cape will see an increasing trend of people staying year-round, and bringing jobs that allow them to work remotely. Some of the migration will likely dissipate once the pandemic has passed, but the Cape will likely continue to draw people who have the ability to work remotely now that this option is more available. **This suggests potential for co-working space to provide shared facilities that support remote working arrangements.**

Entrepreneurial Commercial Space

The 2017 TAP report recommended creating entrepreneurial commercial space in North Eastham as an economic development strategy.³⁵ This might include **commercial kitchen**, co-working, or facilities to support the Blue Economy. Flexible work space could also include makerspaces, artisan studios, or shared retail space for specialty foods or locally-made products. There is potentially strong demand for space to accommodate a variety of operations, storage, sales, and events, given the concentration of tradespeople and artists/artisans living and working in the region.

Indoor/outdoor space to accommodate pop-up retail, a specialty food market, and community rooms for classes and events could fulfill an unmet need, supporting the establishment of new businesses, and provide an amenity for businesses and residents. Besides space, these types of uses require operational staff to manage them. Depending on the specific type of use, shared spaces require full time staffing to provide customer service, site management, member coordination, and/or **incubator** services.

³³ Eastham Registered Business Database 2020

³⁴ Interview with Robbin Orbison of CapeSpace, 3/31/2021

³⁵ Urban Land Institute Technical Assistance Panel (TAP) Report (2017)

Start-up food businesses depend on the availability of commercial kitchen space. This may be obtained by renting restaurants or institutional kitchens (i.e., churches, schools, or fraternal organizations) during off hours, however these locations are not always compatible with a need for on-site storage and late-night access. A nonprofit organization, Cape Cod Culinary Incubator provides education and coordinates access to **commissary kitchens**, or shared commercial kitchen facilities for start-up enterprises. Combining kitchen facilities with ample storage capacity and additional space for classes or events is ideal. The organization is exploring the development of commercial kitchen incubator spaces in the Mid Cape and Lower Cape which would be shared on a membership basis.

Commercial kitchen space is in high demand but it is difficult to make profitable or self-sustaining as a business model. **Given the geography and low population density of the Outer Cape, it is unlikely that the region would support a business incubator, commissary kitchen, or maker space without community support or subsidy of some kind.** There may be potential to meet some demand for incubator kitchen facilities through the conversion of existing restaurants, particularly where there may be closures as a result of the pandemic. Still, **it is likely that a business incubator, maker space, or commissary kitchen in the Outer Cape area would require significant community support.**³⁶

Community Recreation and Public Spaces

Although not a commercial use, studies have highlighted a need for both indoor and outdoor community gathering space and recreation facilities in Eastham. The 5-Year Strategic Plan outlines a goal of creating a community center for all ages. Specific recreation and community needs that have been mentioned include:³⁷

-) Large multifunction/multipurpose space
-) Small meeting space
-) Public outdoor gathering space
-) Indoor Olympic-sized pool
-) Athletic and fitness facilities
-) Arts and music practice, exhibition, and studio space
-) Community TV facilities and studio space
-) Community kitchen space
-) Community garden space

Some of these community needs overlap with economic development goals. Indoor and outdoor gathering spaces can accommodate pop-up retail, temporary markets for selling specialty foods and locally-made products, or hold events that attract visitors and promote local

³⁶ Interview with Harry Henry, Cape Cod Culinary Incubator, 3/3/2021

³⁷ T-Time Development Committee Status Report and Request for Public Input

businesses and artisans. Indoor multipurpose meeting spaces can also provide a place for classes, demonstrations, or fundraising events.

As noted above, business incubator spaces such as commercial kitchens, maker spaces, and communal offices would be difficult to sustain as profit-making businesses in the Outer Cape region given its low population density. However, community-supported spaces could provide an amenity to year-round residents and help to support Eastham entrepreneurs.

Community-Supported Flex Space



The Harwich Cultural Center serves as a rental space for groups and individuals to engage in recreational, social, educational, cultural, community service, civic and governmental activities. Established by the Town in 2017, it occupies a 78,000 square foot Town-owned building that formerly served as a middle school. Classrooms have been arranged into 40 artist studios, with a waiting list for studio space. The building also has performance and event spaces, a commissary kitchen, and hosts the Harwich Cape Verdean Museum. In 2018 the building generated enough revenue to approximately cover its operating and maintenance costs. (C&P Business Media, [A Creative Compact: Harwich Cultural Center leads to alliance with state](#), April 9, 2018)

Section 4: Barriers to Commercial Development

Several barriers to economic development have been echoed in various planning documents, in the T-Time Development Committee's process, and by participants interviewed for this study.

Infrastructure

Infrastructure needs that were identified as part of the T-Time Development Committee's research and fact-finding are common to commercial uses throughout the Town. It was suggested that development at the T-Time site could provide a catalyst to meet infrastructure needs or goals for surrounding properties.³⁸

-) Wastewater management is a critical concern because of the sensitivity of Eastham's water resources. Wastewater infrastructure is needed to support higher density residential or commercial uses. Many commercial properties could have space for redevelopment, expansion, upgrading, or conversion to a more intensive use, but are constrained by their reliance on septic. It is not economically feasible in most cases to develop wastewater treatment systems at a scale to support individual properties.
-) Route 6 presents challenges for traffic circulation, safety, and pedestrian connectivity due to the high traffic volume combined with a high number of curb cuts in North Eastham. A more connected, walkable village center could help to provide a draw for retail uses and make it easier for people to patronize multiple businesses. The 5-Year Strategic Plan identified a need to improve safety and reduce speeds on Route 6, create connectivity between businesses, and implement Complete Streets initiatives to provide multimodal infrastructure and traffic calming measures. Additional suggestions have included the development of a pedestrian walkway either over or under Route 6, more traffic lights, turning lanes, and improving sidewalks.³⁹
-) For most of Cape Cod, internet service is provided by Comcast, which was noted by many survey and interview participants to have unreliable capacity. Connecting to the OpenSpace high-speed fiberoptic network is prohibitively expensive for most private users, particularly at locations farther from the stem located along Route 6. Coordinating an investment in the expansion of the fiberoptic network to serve the North Eastham commercial area, or to connect to homes throughout the town could help to support institutional and business activities and attract higher quality uses.

Regulatory Constraints

Strict zoning and environmental regulations have been cited as a constraint both on new development, as well as the expansion or adaptation of existing commercial properties to accommodate growth. **Many commercial/retail properties are underutilized and have**

³⁸ T-Time Development Committee Status Report and Request for Public Input

³⁹ "Complaints outnumber compliments at Route 6 meeting", Cape Cod Times, 2/27/2019

capacity for expansion. Also, a large share of Eastham’s commercial buildings are older and reaching functional obsolescence. For many businesses it may not be economically feasible to invest in modernizing or rehabilitating their structures due to restrictive zoning requirements or limitations on their ability to expand operations.

At the same time, Eastham’s limited commercial space was identified as a constraint by all types of businesses who participated in the survey and focus groups. A majority of survey respondents indicated that they intend to expand their operations and several indicated that their current spaces are too small to meet their needs. Most respondents referred to the need for more indoor space, but some indicated a need for more outdoor space and parking. Some are looking for space to rent or share, while others are looking to build out spaces that they currently own or would purchase and build to suit. **Regulations, unfriendliness to commercial development, and wastewater/septic limitations are the most common barriers cited.**

Where environmental regulations are the limiting factor, the options for overcoming this constraint would be the development of public or shared wastewater infrastructure, or to be allowed a sufficient density of development to absorb the cost of constructing onsite wastewater treatment.

Cost of Living

Lack of year-round housing options affordable to seniors, low-income residents, and members of the workforce is consistently identified as a significant concern. The cost of living – in particular, the cost of housing – is a constraint on commercial growth, as businesses have difficulty filling their staffing needs. Average

There is a widely documented need for rental housing, senior housing, and modest single family or townhouses, affordable to a range of low and middle income levels.

wages offered by Eastham establishments were less than \$50,000 in 2019, which is far below the amount needed to be able to afford the median sales price for a single-family homes was \$470,000.⁴⁰ There is very little year-round rental housing available in the Outer Cape region, as seasonal rentals generate substantially higher revenues.⁴¹ As a result, a significant proportion of the Outer Cape’s year-round workforce commutes from off-Cape, while many businesses are dependent upon foreign H-2B and J-1 visa workers to fill seasonal staffing needs. Some employers have invested in buying housing to provide to their seasonal or year-round employees.

⁴⁰ Banker & Tradesman, 2019

⁴¹ A 2018 study in Provincetown found that property owners using platforms like AirBnB during the five-month peak season can generate more than double the revenue that could be generated by renting to a local worker for a full year at \$1,300. Understanding the Housing Needs and Challenges Facing Provincetown, MA, University of Massachusetts, Dartmouth, 2018

Related to the high cost of living, there is a need for services and amenities to support both year-round and seasonal residents of Eastham and the Outer Cape. **Expanding the availability of affordable childcare and health care related businesses would help to enable expansion of the Outer Cape workforce and to increase the year-round employment base.**

Section 5: Commercial Development Potential

The following table summarizes the potential for expansion or development of a range of commercial uses that could have potential for growth in Eastham.

Use	Strengths	Weaknesses	Potential
Hospitality	<ul style="list-style-type: none"> Unmet demand for higher end accommodations and wider variety of year-round restaurants. 	<ul style="list-style-type: none"> Seasonality makes it difficult to finance start-up. Environmental regulations constrain capacity. Lower paying jobs, dependent on seasonal workforce. Difficulty filling year-round staffing needs due to high cost of living. 	<ul style="list-style-type: none"> Entertainment type restaurants such as wine bars or a microbrewery would be supported by both locals and tourists. Easing the way for food trucks could help to expand restaurant options. Wastewater infrastructure could help to increase seating capacity to support the feasibility of upgrading and expanding existing facilities.
Retail	<ul style="list-style-type: none"> Limited demand for new retail establishments. Trade area is underserved by health & personal care stores, electronics & appliance stores, home furnishing stores, clothing stores, auto parts & tire stores and jewelry, leather & luggage stores. 	<ul style="list-style-type: none"> Route 6 and Eastham's lack of a walkable village center make it harder for specialty retailers to thrive. The expansion of online shopping is impacting the viability of many brick and mortar retailers. Although these retail establishments are lacking from the trade area, many can be found within a 20-minute drive. 	<ul style="list-style-type: none"> Low vacancy rates and lack of modern retail facilities could provide an opportunity for additional retail facilities. The primary trade area has a concentration of high-income older households representing market opportunities for more upscale and luxury retail rather than national chains that typically require a greater population base. Small scale retail along the Route 6 frontage of the T-Time property would enhance the corridor.
Trade Park	<ul style="list-style-type: none"> High unmet demand for trade space to serve contractors, property, vehicle and boat maintenance businesses, as well as food processing and storage. Strong demand for trade and property management services from year-round and seasonal homeowners and to support rental properties. Supports higher paying year-round jobs, mix of skill levels. Supports start-ups and businesses that cannot operate out of residential properties. 	<ul style="list-style-type: none"> Not compatible with the goal to create a "walkable village" in some locations. 	<ul style="list-style-type: none"> Redevelopment of underutilized or obsolete structures could increase capacity and create higher quality space. Holmes Road has undeveloped plan that can support additional space. Wastewater infrastructure could help to expand the range of uses that can be accommodated.

Use	Strengths	Weaknesses	Potential
Commissary Kitchen	<ul style="list-style-type: none"> Supports specialty foods, which is a sector with potential for growth. Supports start-ups. Can potentially provide a home base for food trucks. 	<ul style="list-style-type: none"> Not likely to be sustainable without public subsidy due to low density on the Outer Cape. 	<ul style="list-style-type: none"> A commissary kitchen could be part of a public community center or incubator development.
Maker Space and Studios	<ul style="list-style-type: none"> Supports start-ups in trades, manufacturing, and arts. 	<ul style="list-style-type: none"> Not likely to be sustainable without public subsidy due to low density on the Outer Cape. 	<ul style="list-style-type: none"> Maker Space and studios could be part of a public community center or incubator development.
Multipurpose/Flex Space	<ul style="list-style-type: none"> Potentially supports a variety of activities, including arts, education, childcare, fitness, and pop-up retail. Indoor/outdoor events space can provide a venue to promote and support local entrepreneurs. 	<ul style="list-style-type: none"> Likely requires public investment to build and operate the space. 	<ul style="list-style-type: none"> Multipurpose/flex space could be part of a community center or incubator development. Could be incorporated as part of a mixed-use development.
Professional Office	<ul style="list-style-type: none"> Small existing inventory and low vacancy for professional office space. Likely unmet demand for private “Class A” office space, meeting spaces, and supportive services, given the large number of home-based professional services businesses. After pandemic restrictions lift, likely potential for growth in shared or communal work spaces. 	<ul style="list-style-type: none"> Low density on the Outer Cape limits the amount of co-working space that can be profitably operated. Most demand for office space is for very small professional service businesses or individuals working remotely for off-Cape entities. Not likely to attract larger organizations to locate in Eastham. 	<ul style="list-style-type: none"> There is likely potential for a limited amount of coworking or small private office space to serve Eastham and surrounding communities. Providing connection to the OpenCape network along with business services could help to support Eastham-based businesses.
Medical Office	<ul style="list-style-type: none"> Expanding need for medical services to meet the needs of the growing senior population as well as seasonal visitors. 	<ul style="list-style-type: none"> Cost of living has been a barrier for attracting staff at all levels to support medical and human services. 	<ul style="list-style-type: none"> There is potential for growth in medical services. Addressing the need for year-round housing affordable to a range of income levels can help to attract the workforce needed to support expansion of medical services (among other industries).
Blue Economy	<ul style="list-style-type: none"> Locally-based wholesalers help to bring large quantity of product to market. Cape Cod National Seashore provides opportunities for research and environmental advocacy. Growing popularity of outdoor recreation. 	<ul style="list-style-type: none"> Fishermen and wholesalers are impacted by the need for storage and operational space and by infrastructure constraints. Shellfish is subject to volatility in demand. Permanent organizations that support year-round research and advocacy are located in other communities on the Cape; there is little likelihood for expansion of these existing entities or spin-offs to locate in Eastham. 	<ul style="list-style-type: none"> Wastewater and waterfront infrastructure improvements and development of trade space could support fishing and shellfishing industry. There is potential to facilitate or promote direct local sales of fish, shellfish, and seafood products. Eastham may be able to attract individual researchers or small organizations for long-term or seasonal projects. This work may be accommodated in professional or home-based office spaces.

T-Time and Other Potential Development Sites

Although the T-Time site is located outside of the area that has been identified in prior studies as the core of a potential village center, the size and location of the site, with frontage on both Route 6 and the Cape Cod Bike Trail, presents an opportunity to facilitate planned development consistent with the vision for improvement of the Route 6 Corridor, and fulfilling community needs. The T-Time property could support a mix of uses, incorporating commercial development opportunities and community needs described above.

-)] The T-Time property's frontage on Route 6 could be developed for small retail shops with parking behind the buildings. This could enhance the streetscape and increase visual continuity along Route 6.
-)] People might be encouraged to come from the bike trail onto the site if there were pop-up kiosks that sold water and snacks oriented to the trail during the warmer months.
-)] The remaining portion of the 11 acres of the T-Time property could accommodate a mix of uses outlined in this study including housing, medical offices, entrepreneurial flex space, a community center, and outdoor event space.
-)] While trade space is in high demand, heavier industrial uses may not be compatible with creating a walkable village that includes residential uses. Trade space could be incorporated in a mix of uses together with retail, office, and flex uses.

Many of the commercial properties throughout Eastham's commercial areas have buildings which are older or obsolete and in need of updating, conversion to another use, or redevelopment. Some properties also have space for expansion and/or potential for additional commercial or residential development. While the town has implemented zoning consistent with a vision for the North Eastham commercial area, infrastructure, environmental, and regulatory constraints, along with the seasonal market, continue to limit the capacity and feasibility of making improvements that could meet community needs or facilitate economic growth.

The retail gap analysis found potential demand within the Primary Trade Area (which includes all of Eastham as well as parts of Orleans and Wellfleet) for about 25,000 square feet of retail space, which would occupy approximately 2.5 acres. It is recommended this space be concentrated along Route 6.

The Harbor and Waterways Plan identifies opportunities to improve infrastructure at Town launching sites such as at Rock Harbor and Hemenway Landing to support commercial fishing and other commercial water-based uses, as well as to expand opportunities for visitors and residents to enjoy the waterfront through business and cultural events and activities, as well as parking and circulation, ADA improvements, and storage of vessels and equipment.

Appendix 1: Definitions

Commercial Kitchen – A commercial-grade facility that is licensed for food service providers to prepare and store food

Commissary Kitchen – Established commercial kitchens that can be rented by food service providers to prepare and store their food.

Convenience Retail Business -Businesses that cater to the day-to-day needs of residents. People will only travel shorter distances for convenience retail. Health & Personal Care Stores is an example of a convenience retail business.

Co-Working Space – Shared office space with common infrastructure such as equipment, utilities, shared or private work spaces, private meeting rooms, receptionist, and custodial services.

Culinary Incubator Space – Synonymous with commissary kitchen, provides commercial kitchen space that can be rented, typically by small food service entrepreneurs, to prepare and store food. Facilities may also include dining, classroom, or event space.

Destination Retail Business – Businesses where residents shop only periodically and are willing to travel longer distances. Automobile Dealerships and Department Stores are examples of businesses that fall under this category.

Incubator – Organization that helps businesses to grow and succeed by providing free or low-cost workspace, mentorship, expertise, and sometimes additional resources such as access to investors and working capital.

Location Quotient – A ratio that compares an area's distribution of employment by industry to a reference area's distribution.

Maker Space – A makerspace is a communal or collaborative workshop that contains supplies, equipment, and technology such as 3D printers, soldering tools, industrial sewing machines, etc., for creative projects.

Negative Retail Gap - Indicates supply exceeds demand within a specific geographic area, indicating that customers are coming from outside the geography.

Positive Retail Gap - Indicates demand exceeds supply within a defined geographic area, and consumers are leaving the area (or going online) to purchase goods and services in that category.

Retail Leakage (gap) - Calculated as demand minus supply.

Short-term Rental – Occupied property (may be an apartment, house, cottage, or condominium) that is not a hotel, motel, lodging house or bed and breakfast establishment,

where at least one room or unit is rented out by an operator through the use of advance reservations. (It should be noted that it is difficult to determine the exact number of short-term rentals as many are not registered with the Town.)

Total Retail Spending Potential - The annual spending potential of existing residents, the annual spending associated with the increase in population expected in a specific geographic area, and the annual spending associated with workers or tourists within a specific geographic area.

Retail Categories are based upon 3- and 4-digit NAICS code:

Auto Parts & Tire Stores: This includes motor vehicle supply stores and tire stores such as Cape and Island Tires in Orleans. There are no stores in this category in Eastham.

Beer & Wine Stores: These are package stores. In Eastham there are 2 package stores – Sam’s Uncorked and Town Center Fine Wine-Spirits.

Book & Music Stores: This category includes bookstores, music stores and newsstands. The Eastern National Park Bookstore located at the National Seashore Visitor Center falls in this category.

Building Supply and Materials Stores: This includes home centers, hardware stores, and paint stores. Eastham Ace Hardware falls in this category.

Clothing Stores: This includes men’s and women’s clothing stores, children’s clothing stores, and clothing accessory stores. ARTichoke is an example of a clothing store in Eastham.

Drinking Places: This category includes bars. While there are bars in Eastham, they all serve food and fall under the category of Restaurants and Eating Places.

Electronics & Appliance Stores: This category includes electronic stores and stores that sell household appliances. Although Eastham does not have any electronic stores, it does have repair and service establishments such as Curtis Appliance Center, that fall within this category.

Florists: This includes retailers selling cut flowers, floral arrangements, and potted plants purchased from others. Cape Village Florist falls in this category.

Furniture Stores: There are no furniture stores in Eastham.

General Merchandise Stores: This includes dollar stores, warehouse club stores, variety stores, and general stores. There are no retailers in this category in Eastham.

Health & Personal Care Stores: This includes pharmacies, drug stores, beauty supply stores, and nutrition supplement stores. There are no stores in this category in Eastham.

Home Furnishings Stores: This includes stores that sell window treatments, floor coverings, and kitchenware. On Cape Kitchen is an example of a store that falls in this category.

Jewelry, Luggage & Leather Goods Stores: This category includes jewelry shops, jewelry repair stores, leather goods, and luggage shops. Eastham does not have any retailers that fall in this category.

Lawn & Garden Stores: This includes nurseries, garden centers and stores that sell outdoor power equipment. The Market Place Home and Garden Center and Nauset Gardens fall in this category.

Miscellaneous Store Retailers: This includes stores not covered by the other categories such as pet supplies, art dealers, and candle shops. Eastham has several of these stores including Pure Vita and The Gallery.

Office Supply, Stationary, Gift & Novelty Stores: While Eastham does not have any office, supply stores it has several gift shops such as The Gift Barn and Three Sisters.

Shoe Stores: This category includes all shoe stores including athletic shoes and children's shoes. There are no retailers in this category in Eastham.

Special Food Services: This includes food service contractors, caterers, and mobile food services. Sumptuous Catering and Cape Cod Private Dining are examples of Eastham based businesses that fall in this category.

Specialty Food Stores: This includes butcher shops, seafood markets, fruit, and vegetable stores. Mac's Market is an example of a specialty food store.

Sporting Goods & Hobby Stores: This includes bike shops, fishing stores, surf stores, toy, and game stores. Examples in Eastham include Little Capistrano Bike Shop.

Restaurants and Eating Places: This category includes full-service restaurants, fast food restaurants, cafeterias, and coffee shops. There are many places in Eastham that fall in this category including the Fairway Restaurant, Arnold's Lobster & Clam Bar, the Brickhouse Restaurant, Dunkin Donuts, and the Chocolate Café.

Used Merchandise Stores: This includes thrift shops, antique stores, and secondhand clothing stores. Gristmill Antiques, Buddha Bobs, and Eastham Thrift Shop fall in this category.

Appendix 2: Stakeholder Engagement

The following people shared information or provided input to this study via interviews, focus groups, or email. In addition, the Town undertook an economic development survey in conjunction with this study, to which 30 business owners responded anonymously.

John Simonian	Beanstock Coffee
Matt Cole	Cape Associates
Wendy Northcross	Cape Cod Chamber of Commerce
Cindy Horgan	Cape Cod Children's Place
Kristi Senatori	Cape Cod Commission
Harry Henry	Cape Cod Culinary Incubator
Bert Talerman	Cape Cod Five
Ryan Castle	Cape Cod & Island Association of Realtors
Geoff Sanders	Cape Cod National Seashore
Stacie Peugh	Cape Cod YMCA
Robbin Orbison	CapeSpace
Fred Bierwirth	Chatham Works
Pam Anderson	Community Development Partnership
Jeff Cusack	Cove Road Real Estate
Jim Russo	Eastham Chamber of Commerce
Robin Wessman	Eastham Painters Guild
Sarah Wilcox	Eastham Superette
Christin Marshall	EforAll Cape Cod
Denise Kopasz	Foran Realty
Ken Taber	Hole in One Group
Jignesh Patel	JNL Management
Scott Kerry	Kerry Insurance
Amanda Converse	Love Live Local
Kara Galvin	MassHire Cape & Islands Workforce Board
Steve Johnson	Open Cape
Bob Sheldon	RE Max / Spectrum
Lori Meads	Seamen's Bank
Tim Klink	The Coastal Companies
Jeanne LaPiana	Town Center Plaza
Nicole Paine	Town of Eastham Shellfish Constable
Alex Hay	Wellfleet Shellfish
Stephanie Ellis	Wild Care Cape Cod

Attachment 6:
**Eastham Housing Production Plan –
Executive Summary**

TOWN OF EASTHAM, MASSACHUSETTS

HOUSING PRODUCTION PLAN



Village at Nauset Green

June 2021

Prepared for the Eastham Select Board

Karen Sunnarborg, Housing and Planning Consultant

With technical support from Paul Lagg, Director of Community
Development

TOWN OF EASTHAM HOUSING PRODUCTION PLAN

I. EXECUTIVE SUMMARY

A. Introduction

Eastham is primarily a residential community with a year-round population of about 5,000 residents. The town is particularly challenged during the summer months when the combination of seasonal residents and visitors, drawn to the town by its stunning natural beauty and wide-ranging recreational opportunities, can increase the population more than five-fold. These visitors bolster Eastham's tourist economy, but also place enormous pressures on local services and the housing market. Pressures on the housing market were amplified during the 2020-2021 Covid-19 pandemic due to the loss of income experienced by some residents and the heightened demand from those seeking Eastham as a safer retreat from the pandemic.

In tandem with growing numbers of seasonal units and second homes, now at about 60% of all units, dramatic demographic shifts have been occurring. Not only is Eastham losing population, but it is also continuing to lose younger residents simultaneously to substantial gains in older ones. These demographic changes are projected to continue and likely contribute to further losses in population diversity, significant shifts away from families and workers, and an extended retirement focus. Rising housing costs are aggravating the situation, leading to wider affordability gaps and severe cost burdens. This situation is not unique to Eastham as it is a trend throughout the Cape, the Lower and Outer Cape in particular. Consequently, planning efforts have focused on strategies to attract younger residents to the community and also meet the needs of Eastham's increasing population of older adults.

This Housing Production Plan represents an update of the Plan that was completed and approved in 2016 and the work that was recently adopted as part of the Eastham Strategic Plan for FY2020-2024, presenting a snapshot of current conditions and trends as well as an outlook on the future. It also analyzes the existing gaps between what housing is available and what residents can afford, including a review of local, regional and state programs and resources to address unmet housing needs. The Plan will also help forward the goals, priorities and actions included in the recent Town-wide Strategic Plan.

B. Summary of Housing Needs Assessment

A summary of key community demographic and economic characteristics in comparison to Barnstable County and the state is included in Table I-1 and highlighted below. Appendix 1 includes the percentage changes between 2000 and 2019 for these same characteristics, offering another point of comparison.

- *Declining population*

Like Barnstable County as a whole, Eastham has been losing population and at a faster rate, with a 10% rate of loss between 2000 and 2019 compared to 4.2% for the county according to 2019 census estimates. The population is now estimated to be down to 4,901 residents from 5,453 in 2000. Town records suggest a somewhat lower rate of loss at 7.6% with 5,037 residents as of 2019 with some uptick to 5,246 residents as of the end of 2020, representing a 3.8% decrease from 2000.¹

**Table I-1: Summary of Demographic Characteristics for
Eastham, Barnstable County and the State, 2000 and 2019**

Demographic Characteristics	Eastham		Barnstable County		Massachusetts	
	2000	2019	2000	2019	2000	2019
Total population	5,453	4,901	222,230	212,990	6,349,097	6,892,503
% less than 20 years	19.3%	18.5%	22.1%	16.6%	26.4%	22.6%
% 20 to 34 years	12.7%	9.1%	13.2%	14.0%	21.0%	21.4%
% 35 to 44 years	14.3%	8.0%	15.3%	9.1%	16.7%	12.3%
% 45 to 54 years	15.1%	10.2%	14.8%	11.5%	13.8%	23.0%
% 55 to 64 years	12.6%	22.0%	11.5%	17.4%	8.6%	13.7%
% 65 years or more	26.0%	38.4%	23.1%	31.5%	13.5%	17.0%
Median age	47.6 years	60.1 years	44.6 years	54.1 years	36.5 years	39.7 years
% Family households	68.2%	63.6%	64.0%	64.1%	64.0%	62.8%
% Non-families	31.8%	36.4%	36.0%	35.9%	36.0%	37.2%
Average household Size	2.24 persons	2.05 persons	2.28 persons	2.18 persons	2.51 persons	2.51 persons
Median hh income	\$42,618	\$72,075	\$45,933	\$74,336	\$50,502	\$85,843
Individuals in poverty	5.5%	8.3%	7.0%	5.2%	9%	9.4%
% Incomes < \$25,000	22.0%	14.8%	24.6%	13.5%	24.6%	15.5%
% > \$100,000	10.2%	29.6%	12.4%	35.6%	17.7%	43.5%

Source: U.S. Census, 2000 and American Community Survey 5-Year Estimates, 2015–2019.

Some population projections for 2030 suggest even greater population losses, down to 3,512 residents according to MAPC estimates and as low as 3,840 residents based on calculations from the UMass Donahue Institute. These projections include further demographic shifts that involve losses in all age groups with the exception of those 65 years of age or older, projected to grow to almost two-thirds of all residents.

¹ The historic disparity between the federal and local figures is largely because federal census counts students as living at their colleges and universities while the Town counts students as living at the home of their parents. Some of those counted are also inactive voters that might have moved but cannot be eliminated from the census for two biennial state elections if they do not return a confirmation notice.

On the other hand, the Cape Cod Commission (CCC) and Barnstable County Regional Housing Market Analysis² suggested population growth for the county in general and for Eastham as well to an estimated population of 5,196 residents by 2025, representing a 4.8% rate of growth between 2010 and 2025. The report relied largely on the forecasts from Moody's Analytics that relate to the structural economy instead of typical projections based on changes in births, deaths and migration patterns that are less reliable in seasonal economies and retirement destinations.

- *Loss of younger residents and substantial gains in older ones*
Demographic shifts have resulted in fewer children, from 19.3% to 18.5% of residents under age 20 between 2000 and 2019, decreases in young adults from 27.0% to 17.1% of those ages 20 to 44, and substantially more older residents with an increase from 26.0% to 38.4% of those 65 years of age or older. This aging of the population is reflected in the increase in the median age to 60.1 years compared to 54.1 and 39.7 years for the county and state, respectively. It is also signaled by increasing numbers of those with special needs as 14.5% of Eastham residents claiming a disability compared to 11.6% for the state based on 2019 census estimates.

The relatively high cost of living in Eastham, the relatively low amount of affordable housing, and limited employment opportunities in particular, are creating barriers for younger age groups and making it increasingly more likely that those who grew up in Eastham will be less able to raise their own families locally without housing subsidies or help from their families. The ability to retain and attract new residents, particularly young families, remains a priority issue for the Town in the years ahead, also addressed in the Town's recently-adopted Strategic Plan.

- *Modest losses of families*
There has been a small decline in the percentage of families, from 68.2% to 63.6% of all households between 2000 and 2019. The percentage of families has remained about the same during the past two decades for the county, at 64%, but decreased somewhat for the state as a whole, from 64% to 62.8%. These losses are largely due to the aging of the population, driven by the baby boomers³, with more people living alone in tandem with fewer children.
- *Lower level of higher-income earners*
The median household income increased from \$42,618 to \$72,075 between 2000 and 2019 with a median somewhat lower than Barnstable County's at \$74,336 in 2019, and

² Crane Associates, Inc. and Economic & Policy Resources, "Regional Housing Market Analysis and 10-Year Forecast of Housing Supply and Demand for Barnstable County, Massachusetts", prepared for the Cape Cod Commission, June 30, 2017.

³ Members of the large generation born between 1946 and 1964.

significantly lower than the state level of \$85,843. The percentage of those earning less than \$25,000, at 14.8%, is relatively comparable to 13.5% and 15.5% for the county and state based on 2019 census estimates. On the other end of the income range, the percentage of households earning more than \$100,000 is lower in Eastham at 29.6% compared to 35.6% and 43.5% for the county and state, respectively.

- *Increasing poverty*

The proportion of Eastham residents living in poverty increased from 5.5% to 8.3% between 2000 and 2019 while decreasing for the county from 7.0% to 5.2%. The state level increased only modestly from 9.0% to 9.4%. Clearly some residents have experienced some loss of income, perhaps through unemployment or underemployment, and are likely struggling to remain in the community.

Table I-2 provides a comparative summary of key housing characteristics for Eastham, Barnstable County and the state. Appendix 1 summarizes the percentage changes between 2000 and 2019 for these same characteristics, offering another point of comparison.

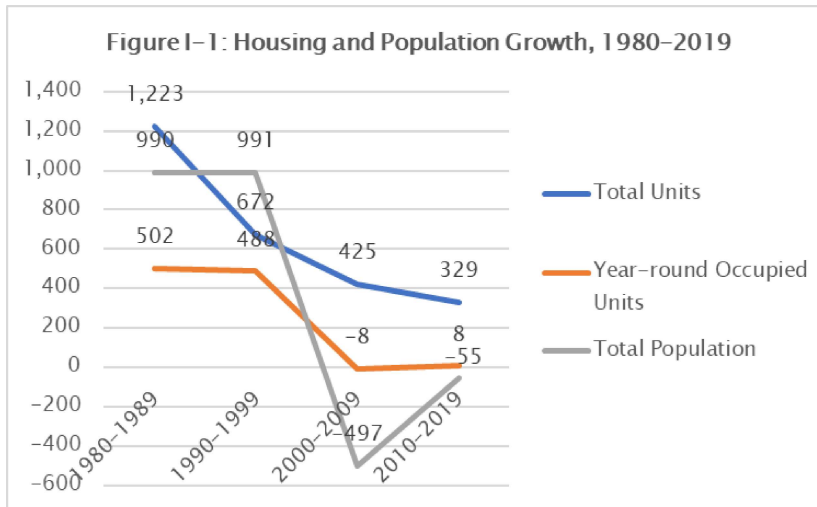
**Table I-2: Summary of Housing Characteristics for
Eastham, Barnstable County and the State, 2000 and 2019**

Housing Characteristics	Eastham		Barnstable County		Massachusetts	
	2000	2019	2000	2019	2000	2019
Total housing units	5,535	6,289	147,083	164,686	2,621,989	2,928,818
% Occupied housing (year-round units)	43.3%	38.1%	64.5%	58.6%	93.2%	90.5%
% Seasonal or occasional use	52.3%	60.7%	32.0%	36.8%	3.6%	4.1%
% Owner-occupied	82.3%	90.7%	77.8%	80.0%	61.7%	62.2%
% Renter-occupied	17.7%	9.3%	22.2%	20.0%	38.3%	37.8%
% Single-family, detached structures	94.9%	95.0%	82.9%	83.3%	52.4%	51.8%
Median sales price Banker & Tradesman 2000/2020	\$192,300	\$520,000	\$178,800	\$475,000	\$185,000	\$445,950
Housing growth 2000 to 2019	13.6%		12.0%		11.7%	
Housing density 2000 to 2019	203.4 to 231.1 units per square mile		371.6 to 416.1 units Per square mile		334.5 to 373.6 units per square mile	

Source: U.S. Census, 2000 and American Community Survey 5-Year Estimates, 2015-2019.

- *Slower housing growth*

Despite a decrease in the population of year-round residents, net new housing units increased by 754 units or 13.6% between 2000 and 2019 according to census data, a rate somewhat higher than county and state housing growth rates of 12% and 11.7%,



respectively. Building permit data suggest a somewhat lower level of housing growth, at 667 units, during this period. Housing production is still considerably lower than the boom years of housing construction with a 19.3% rate of growth in the 1980s, for example.

- *High and growing seasonal housing pressures⁴*

Housing in Eastham involves two distinct markets, the year-round housing market and the seasonal or second home market now comprising 60% of all dwellings compared to 37% for Barnstable County as a whole and only 4% statewide. In the summer months, Eastham's resident population increases to almost 30,000, putting enormous pressure on Town services and the long-term, permanent population.

Figure I-1 shows the flat growth in new year-round units compared to total unit growth, providing the incremental additions to the housing stock between decades, also showing population change. Almost all new housing growth has been part of the seasonal or second home market.

Year-round production has recently been buoyed by the 65 new units as part of the Village at Nauset Green development that are not included in these census figures as of yet.

- *Relatively low housing density*

Eastham's housing density was significantly lower than the county and the state at about 231 per square mile as compared to 416 and 374, respectively. This is largely reflective of the considerable amount of preserved open space in town, including the National Seashore. In fact, about one-third of the town's land area is part of the National Seashore, and about another 500 acres of protected open space are owned by the Town

⁴ In the U.S. Census, seasonal units are defined as those that are intended by the owner to be occupied during only certain seasons of the year. They are not anyone's usual residence. A seasonal unit may be used in more than one season; for example, for both summer and winter sports. Published counts of seasonal units also include housing units held for occupancy by migratory farm workers. While not currently intended for year-round use, most seasonal units could be used year-round. In regard to units for occasional use, these are defined by the census units held for weekend or other occasional use throughout the year. Second homes may be classified as occasional use or as seasonal.

This significant reserve of open space, as well as other undevelopable natural resources, has helped make Eastham a particularly appealing place to live or visit, attracting tourists, retirees and second-home owners. Nevertheless, such large amounts of protected land put substantial development pressures on the very limited number of parcels that remain undeveloped or may be redeveloped.

- *Loss of rental units*

Census estimates suggest that Eastham lost 201 rental units between 2000 and 2019, 247 since 1990. Consequently, Eastham's rental housing declined proportionately to 9.3% compared to 20.0% for the county and 37.8% for the state. This points to rental housing being converted to owner-occupancy or from year-round to seasonal use. The declining supply of rentals is further reflected in a zero percent vacancy rate according to 2019 census estimates and little or no listings of available units for year-round use or as winter rentals. The Town has made an important effort to increase the supply of year-round rentals through the recent Village at Nauset Green development and the adoption of new zoning for accessory dwelling units (ADUs).

- *Limited diversity in types of housing*

Almost all of Eastham's housing units were single-family detached homes (95%), significantly higher than the county's level at 82% as well as the state where 52% of all units were in single-family detached dwellings. Almost all of the new housing growth, with the exception of the Village at Nauset Green, has been in single-family homes.

- *High and rising housing costs*

The 2020 median single-family house price of \$520,000 was higher than the county and state at \$475,000 and \$445,950, respectively. While housing prices have been increasing at a steady pace, COVID-19 caused a surge in housing demand that drained the inventory of available listings and pushed prices to unprecedented levels.

Special HUD data indicates that of the almost 1,100 households with incomes at or below 80% AMI, 653 or about 60% were experiencing cost burdens as they were spending more than 30% of their income on housing costs. Of these, 379 or more than one-third were spending at least half of their income on housing, up from one-half and one-quarter in 2012, respectively

Additionally, while the year-round rental housing stock is small, high rental rates were further exacerbated by the pandemic. Some residents, who have relied on more affordable winter rentals in the past, have been outbid by seasonal renters who extended their leases given an ability to work and attend school remotely. While there are few if any listings, realtors suggest that a two-bedroom apartment with upgrades would run about \$1,900. Leasing requirements of a first and last month's rent plus a security deposit create further financial barriers for renters. As housing prices continue to increase, so do the gaps between what housing residents can afford compared to what is

available.

- *Increasing cost burdens*

The 2019 census estimates suggest that 802 households, or one-third of all Eastham year-round households, were living in housing that is by common definition beyond their means and unaffordable as they were spending more than 30% of their income on housing. This is comparable to the state level but higher than the county at 28.5%.

C. Summary of Priority Housing Needs

Based on the Housing Needs Assessment (see Section III), there are a number of key indicators that suggest there are significant local needs for affordable housing that go well beyond what is required to meet the 10% state affordability goal including:

1. Households with Very Limited Incomes

Despite generally increasing household wealth, 355 or about 15% of all households were earning less than \$25,000, substantially more than the 119 subsidized units available. Poverty has also increased over the recent past. Given Eastham's tight housing market, it can be expected that many lower income residents are struggling to afford to remain in the community, made worse by the pandemic.

***Priority Need #1:** Given the high costs of housing, more subsidized rental housing is necessary to make living in Eastham more affordable, particularly for those with very limited financial means. The need for rentals is further demonstrated by a zero percent vacancy rate and importance of replacing some of the rentals that have been lost in recent years.*

2. Affordability Gaps

A traditional rule of thumb is that housing is affordable if the purchase price is no more than 2.5 times the buyer's annual household income. By this measure, the median income household earning \$72,075 in Eastham could afford a house of approximately \$180,188, 40% of the median house price of \$520,000 as of the end of 2020. *This implies that the household in the middle of the town's income range faced an "affordability gap" of almost \$340,000.*

Additionally, the gap between median household income and the median single-family house price has widened. While incomes increased by 130% between 1990 and 2019, the median single-family house price increased by 239% during this same period based on *Banker & Tradesman* data. In 1990 the median income was 23% of the median house price but decreased to 15.7% by 2019. *Moreover, the gap between income and house value was \$103,661 in 1990 but more than tripled to \$385,925 by 2019.*

The declining numbers of younger residents, who are likely confronting problems associated with high living costs and limited job opportunities, suggests the need to further diversify the housing stock in order to better address their housing and financial needs.

Priority Need #2: *A wider range of affordable housing options is needed, including starter housing for younger households entering the job market and forming their own families as well as opportunities for empty nesters to downsize. This includes those who may not meet all state affordability requirements under Chapter 40B but are still priced out of Eastham's housing market.*

3. *Special Needs Households*

Eastham has a higher level of residents with disabilities than the state as a whole, at 14.5% of all residents compared to 11.6%. This level of disability, plus an increasingly aging population, point to significant special needs within the Eastham community. Additionally, there were only eight units of special needs housing available (Department of Mental Health group homes), no subsidized housing units available solely for the elderly, and no assisted living units in the community.

Priority Need #3: *Some amount of new housing should be built handicapped-adaptable or accessible to the disabled, including seniors, and more supportive housing services should also be integrated into new development – goal of 10% of all new units created, 20% for seniors.*

4. *Existing Housing Conditions*

About 55% of Eastham's housing stock was built prior to 1980 and is therefore more likely to have traces of lead-based paint, posing safety hazards to children, as well as problems concerning aging system and structural conditions. Also, because most properties rely on septic systems, some existing systems are likely failing or in disrepair that present problems for Eastham's sensitive environmental conditions.

Priority Need #4: *Programs are needed to support necessary home improvements, including deleading and septic repairs, for units occupied by low and moderate-income households, particularly the elderly living on fixed incomes and investor-owned properties occupied by qualifying households. Current programs to provide assistance in making home repairs should at least be maintained or increased to meet demand.*

D. Summary of Development Challenges

Undertaking a more proactive housing agenda to promote affordable housing will be a significant challenge in Eastham given the following issues:

- *The Town's resources for absorbing growth are limited given significant physical constraints.* For example, Eastham has no centralized sewer system and municipal water services were not available until 2015, making denser development more costly and difficult. The backbone of the water system has been completed with water service available along Route 6 (*which serves dual roles as both a major regional highway and Eastham's "Main Street"*) and major public roads. Water service continues to be installed throughout the remainder of the town with full service to all residential areas available by 2023. However, the lack of centralized wastewater infrastructure will continue to limit residential and commercial development capacity.

- *One-third of Eastham's land area is part of the National Seashore where development is extremely limited.* This large area, as well as the western coastline along Cape Cod Bay, includes substantial marshland, tidelands, wetlands, and other ecosystems that are important wildlife habitats. These natural amenities attract millions of visitors annually and provide highly valued opportunities for a wide range of recreational activities that need to be protected to the greatest extent possible. Additionally, Eastham has a very limited supply of land still available for development, and the Town owns a relatively small amount of developable property that could support affordable housing.
- *Eastham's population increases five-fold during the summer season* as visitors are attracted by the community's wide-ranging recreational opportunities and natural beauty. This surge of population puts enormous pressures on existing Town services and infrastructure and presents other challenges for the community such as how to house seasonal workers and maintain sufficient affordable housing for year-round workers. The pandemic has compelled many seasonal visitors looking for a safer retreat from the pandemic to stay longer, thus reducing winter rentals for year-round residents. It has also drained the inventory of for sale housing, driving up prices.
- Like most localities in the Commonwealth, *Eastham's Zoning By-law embraces large-lot zoning of at least 40,000 square feet per unit, largely in consideration of Title 5 regulations, and limits the types of housing that can be built.* While the Town has incorporated several measures to promote greater housing diversity and affordability, low housing density still constrains the construction of affordable housing by severely reducing opportunities for economies of scale in development.
- Despite approving the Community Preservation Act (CPA) and establishing the Eastham Affordable Housing Trust to promote affordable housing, *the Town still has limited resources to subsidize new development and affordability gaps and cost burdens are widening.*

Due to the relatively high costs of housing, whether for homeownership or rentals, some residents are still finding it difficult to afford to remain in Eastham. Children who grew up in the town continue to face the possibility that they may not be able to find sufficient employment opportunities that will allow them to afford to raise their own families locally. Long-term residents, especially the elderly, are finding themselves less able to maintain their homes and keep up with high expenses, but they are unable to find alternative housing in town that better meets their current lifestyles, including housing that is handicapped-accessible and has supportive services. Seniors are in fact a substantially increasing segment of the population, and the Town will need to focus on their growing housing needs. Families are finding it more difficult to afford to live in town and are spending too much of their income on housing costs. Municipal employees and employees of local businesses are increasingly hard pressed to find

housing that is affordable in Eastham and are confronted with long commutes. COVID-19 has precipitated even more financial challenges. Clearly more housing options are required to meet diverse local needs and produce Eastham's fair share of regional needs.

E. Summary of Production Goals

The state administers the Housing Production Program that enables cities and towns to adopt an affordable housing plan that demonstrates production of 0.50% over one year or 1.0% over two years of its year-round housing stock eligible for inclusion in the Subsidized Housing Inventory (SHI). **Eastham would have to produce at least 13 affordable units annually to meet these production goals**, a formidable challenge. If the state certifies that the locality has complied with its annual production goals, the Town's Zoning Board of Appeals may be able to deny comprehensive permit applications without the developer's ability to appeal.⁵ **This Plan provides production goals over the next five years which include the creation of affordable and workforce units⁶ beyond the 13-unit annual goal as well as other units that are not eligible for inclusion in the SHI but still serve local housing needs.**

The state's subsidizing agencies have entered into an Interagency Agreement that provides more guidance to localities concerning housing opportunities for families with children and require that at least 10% of the units in affordable housing developments that are funded, assisted, or approved by a state housing agency have three or more bedrooms with some exceptions (e.g., age-restricted housing, assisted living, supportive housing for individuals, SRO's, etc.).

F. Summary of Housing Strategies

This Housing Production Plan identifies that significant progress has been made in implementing the Plan that was approved in 2016. **Of particular importance was the development of 65 units of affordable rental housing through the Village at Nauset Green. This project represented the largest development in the community and is a model of inter-**

⁵ If a community has achieved certification within 15 days of the opening of the local hearing for the comprehensive permit, the ZBA shall provide written notice to the applicant, with a copy to DHCD, that it considers that a denial of the permit or the imposition of conditions or requirements would be consistent with local needs, the grounds that it believes have been met, and the factual basis for that position, including any necessary supportive documentation. If the applicant wishes to challenge the ZBA's assertion, it must do so by providing written notice to DHCD, with a copy to the ZBA, within 15 days of its receipt of the ZBA's notice, including any documentation to support its position. DHCD shall review the materials provided by both parties and issue a decision within 30 days of its receipt of all materials. The ZBA shall have the burden of proving satisfaction of the grounds for asserting that a denial or approval with conditions would be consistent local needs, provided, however, that any failure of the DHCD to issue a timely decision shall be deemed a determination in favor of the municipality. This procedure shall toll the requirement to terminate the hearing within 180 days.

⁶ Workforce units are defined in this Plan as those earning between 80% and 120% of area median income who are still largely priced out of the existing housing market.

community cooperation as Wellfleet and Orleans both contributed \$100,000 towards project financing. Because this rental project involved a Chapter 40B comprehensive permit, all units qualified for inclusion on the Subsidized Housing Inventory, including the 15 units that were targeted to those with incomes between 80% and 90% of area median income. This enabled the Town to boost its SHI considerably, from 50 to 119 units between 2015 and 2020, or from 1.9% to 4.6% of its year-round housing.

The Town also made noted progress in modifying its zoning to make Accessory Dwelling Units (ADUs) easier to administer and create. It is hoped that the changes will generate more interest in ADUs to help develop smaller year-round rental units without negative community impacts.

The strategies listed below build on this progress and are categorized according to approaches for building local capacity to implement the Five-Year Strategic Plan and this Housing Production Plan, continuing development and preservation activities, and adopting new regulatory changes. The strategies also reflect state requirements that ask communities to address a number of major categories of housing production approaches.⁷ A summary of these actions is included in Appendix 2 and a summary of the progress made since the 2016 Plan was completed is included in Appendix 3.

It is important to note that these strategies are presented as a package for the Town to prioritize and process, each through the appropriate regulatory channels. It should be noted that while a major goal of this Plan is to eventually meet the state's 10% goal under Chapter 40B, another important goal is to serve the wide range of local housing needs, and there are instances where housing initiatives might be promoted to meet these needs that will not necessarily result in the inclusion of units in the Subsidized Housing Inventory (SHI).

1. Capacity Building Strategies

While Eastham has an existing organizational structure in place to focus on affordable housing issues, including partnerships with local service providers and developers as well as the Eastham Affordable Housing Trust, the following strategies are intended to make additional progress in the Town's ability to create more diverse housing options. It is important to note that local planning should address the need for increasing financial assistance, beyond CPA funding, in support of not only housing but economic development and infrastructure to address demographic shifts and unmet needs.

- ***Hire a Housing Coordinator***

The Town has FY22 funding in place and needs to hire a part-time Housing Coordinator to facilitate and promote activities that address Eastham's need for affordable and workforce housing.

⁷ Massachusetts General Law Chapter 40B, 760 CMR 56.03.4.

- *Continue to conduct ongoing community outreach*

It will be important to continue to engage the community in discussions on affordable housing and help galvanize local support, political and financial, for new production. The Housing Trust has made considerable progress in this area by hiring a marketing consultant and creating a new housing website.

- *Explore new local housing support programs*

The Housing Trust has been developing new housing initiatives to help serve a wider range of local housing needs including a Closing Cost Assistance Program to help first-time homebuyers and a Lease to Own Program to support tenants of Trust-owned properties move on to homeownership. These programs are programmed in the Housing Trust budget but are not yet implemented, pending administrative support from Housing Coordinator.

2. *Development and Preservation Strategies*

To accomplish the actions included in the Five-Year Strategic Plan and this Housing Plan, it will be essential for the Town to continue reaching out to the development community and sources of public and private financing for necessary technical and financial resources. While some of the units produced may rely on the participation of existing property owners, most of the production will continue to focus on joint ventures with both for-profit and non-profit developers to create affordable units.

- *Continue to make suitable public property available for affordable housing*

The Town will continue to conduct the necessary studies and planning to determine the feasibility of developing publicly-owned properties. For example, the Town has created a Development Committee to explore development options for the former T-Time property on Route 6. This Committee has also been tasked with making development recommendations for two additional Town-owned properties including the current Council on Aging (COA) property and Town Center Plaza. All three properties will likely include affordable housing, senior, and/or workforce housing. Once Town Meeting approves a property for affordable housing, the Town will select a developer through a Requests for Proposals (RFP) process based on the Town's terms and conditions for development and state Local Initiative Program (LIP) requirements.

- *Continue to partner with developers on privately-owned properties*

The Town will continue to work collaboratively with area non-profit and for-profit developers on new development opportunities that include the use of local zoning provisions and "friendly" comprehensive permits through the state's Local Initiative Program (LIP).

- *Continue to partner with non-profit organizations on local housing programs*
The Town will continue to work collaboratively with area non-profit housing organizations on special programs to promote affordable rental units and make essential improvements to the existing housing stock.
- *Continue to pursue regional opportunities*
There is a precedent on the Cape to work collaboratively with other communities on a number of housing initiatives. The Town will continue to participate in regional activities including current efforts as well as future opportunities as they arise. For example, establishing a regional land trust to fund and develop land for housing is worth exploring.

3. *Regulatory Strategies*

Housing production is contingent not only on actual development projects but on the regulatory tools that enable localities to guide new housing creation. To most effectively and efficiently implement the strategies included in this Plan and meet production goals, greater flexibility will be needed in the Town's Zoning Bylaw, and new tools will be required to capture more affordable units and better guide new development to specific "smarter" locations. The Town has appointed a Residential Zoning Task Force to explore and recommend zoning changes that will help promote affordable housing. Included in their review will be the following zoning-related strategies:

- *Adopt inclusionary zoning*
The Town should explore the adoption of inclusionary zoning with incentives to ensure that any new residential development in Eastham provides a percentage of affordable or workforce units or cash in-lieu of units to be invested in the Town's Housing Trust Fund.
- *Amend the Open Space Residential Subdivision Development (OSRSD) bylaw*
Eastham's zoning includes an Open Space Residential Subdivision Development (OSRSD) bylaw that requires part of the development parcel be set-aside and regulated as permanent open space when such plan is preferable to a conventional residential subdivision in the Residential A district. This provision promotes a "smarter" and more compact development pattern as units are built in a cluster instead of the conventional grid pattern, allowing higher density on a portion of the site and creating permanently restricted open space as well. The bylaw, however, has not been used to date. The Town should revisit these provisions and determine what measures may better promote its use including density bonuses for the integration of some amount of affordable housing and the extension of the provisions to other zoning districts including commercial zones.

- *Explore rezoning to convert motels to mixed-income housing*

The Town should pursue new zoning to proactively provide support for motel or cottage colony redevelopment activity instead of reacting to proposals to convert such properties that do not integrate affordability and other public benefits that meet local needs and priorities. Eastham has a number of properties that might benefit from this type of rezoning, including older motels and small cottage colonies. Such a project might also benefit from local financial support to ensure the integration of affordable or workforce units.

- *Prepare Design Guidelines*

The process of preparing the Strategic Plan FY2020–2024 recommended that the Town prepare Design Guidelines to help ensure greater resiliency and sustainability of new development as well as more architecturally-compatible design. Guidelines will focus on North Eastham that includes a District of Critical Planning Concern (DCPC).

Attachment 7:
**Eastham 200-24 Strategic Plan –
Executive Summary**

TOWN OF EASTHAM

Strategic Plan

FY 2020-24


**Updated June 2020
(for Fiscal Year-End 2021)**

**Strategic Planning Committee
Town of Eastham
2500 State Highway
Eastham, MA 02642**

**Original Plan Prepared by:
JM Goldson LLC**

OVERARCHING PLANNING PRINCIPLES

These overarching principles set a visionary context and serve to clarify the plan's intention.

- 1. Honor Eastham's history and protect its small-town identity.**
 - 2. Live in harmony with the natural environment and local culture.**
 - 3. Enhance community vibrancy and viability for people of all ages.**
- 
- A decorative graphic consisting of several parallel diagonal stripes in shades of green, blue, and purple, running from the bottom left towards the top right of the page.

EXECUTIVE SUMMARY

The Town of Eastham created this plan to provide direction for town initiatives and priorities between Fiscal Year (FY) 20-24. The plan lays out a set of goals and strategies intended to guide the Town's use of funds, staff, and other resources as well as efforts of boards, commissions, and committees. Working collaboratively with the Strategic Plan Steering Committee (SPSC), Town Planner, and Town Administrator, planning consultant JM Goldson LLC assisted the Town in creating this plan. The plan describes the five-year strategies and action steps, identifies key trends, and challenges, and synthesizes findings of the Town's recent planning efforts. In addition, the plan provides an overview of ongoing town initiatives and identifies additional strategies to consider for implementation in the future or as opportunities arise.

Overarching Principles

The overarching principles set a visionary context and serve to clarify the plan's intention.

1. Honor Eastham's history and protect its small-town identity.
2. Live in harmony with the natural environment and local culture.
3. Enhance community vibrancy and viability for people of all ages.

Goals

The goals of this plan focus on **environmental protection** and enhancing **community character** and consist of the following:

1. Preserve and protect coastal, estuary, pond, and other natural resources.
2. Encourage and welcome a diversity of residents.
3. Improve travel experience for all users.
4. Foster and enhance community spirit.
5. Increase diversity of housing options.
6. Provide and enhance access to public recreational resources for all people.

Metrics to measure goal achievements are outlined in the appendices.

Strategies

The objective substance of this plan lies in the following strategies. These strategies help to achieve the goals of the plan and reflect community priorities for the Town to focus on implementing between FY20-24. The strategies are grouped into four (4) categories that form "strategy packages" designed to achieve the goals of this plan in a comprehensive manner.

1. STRATEGIES TO SUPPORT A CLEAN ENVIRONMENT AND RESILIENT COMMUNITY

- a. Define and implement wastewater solutions to protect critical water bodies.
- b. Increase and protect the wildlife habitat value of existing open space through education, partnerships, a hands-on volunteer network, and financial investment in ecological management.
- c. Protect key parcels for conservation to protect municipal water supply and to enhance community resilience.
- d. Reduce municipal use of non-renewable energy sources and increase energy-conservation measures, such as fuel-efficient municipal vehicles.

2. STRATEGIES TO SUPPORT INTENTIONAL AND WELL-DESIGNED DEVELOPMENT

- a. Make suitable land available for affordable housing.
- b. Redevelop and improve existing buildings to maximize housing potential.
- c. Seek more opportunities to partner with private developers on privately owned sites to create affordable housing.
- d. Adopt Inclusionary Zoning provisions so that private market-rate development will include affordable units.
- e. Adopt architectural design guidelines for new development, particularly along the Route 6 corridor and North Eastham Village Center, to ensure resiliency by design and architecturally compatible design.

3. STRATEGIES TO IMPROVE QUALITY OF LIFE FOR A DIVERSITY OF RESIDENTS AND TO STRENGTHEN THE COMMUNITY

- a. Create a new community center for all ages through new construction or reuse of existing facilities.
- b. Implement free or subsidized pre-K education.
- c. Expand recreational afterschool and other community-wide programs.
- d. Promote public awareness of the Accessory Dwelling Unit (ADU) zoning bylaw to increase the number of accessory dwellings and provide flexible living options as the needs of property owners and residents evolve over time.
- e. Host regular and widely advertised community events for a range of participants.

4. STRATEGIES TO IMPROVE SAFETY FOR ALL MODES OF TRANSPORTATION

- a. Redesign Route 6 to improve safety and reduce speeds by implementing the recommendations of the Route 6 Corridor Study.
- b. Create connectivity between businesses on Route 6 to minimize vehicular activity between adjacent businesses.
- c. Improve traffic safety town-wide by implementing Complete Streets initiatives in key locations, including requiring road construction to include multimodal infrastructure and traffic calming measures.

Plan Organization

- Chapter 1:** Explains priority strategies and action steps for the next five years, including an action plan with identified responsible entities. The SPSC was created to oversee the development of this plan and to continue oversight and support of its implementation.
- Chapter 2:** Describes the additional strategies identified through this planning effort; indicates when and how these strategies may be reconsidered or implemented in the future.
- Chapter 3:** Lays out the methodologies and processes included in this plan and a brief profile of the community.
- Chapter 4:** Provides a synthesized analysis of planning initiatives over the past ten years.
- Chapter 5:** Identifies and recognizes ongoing work and the Town's commitment to the continuation of those efforts.